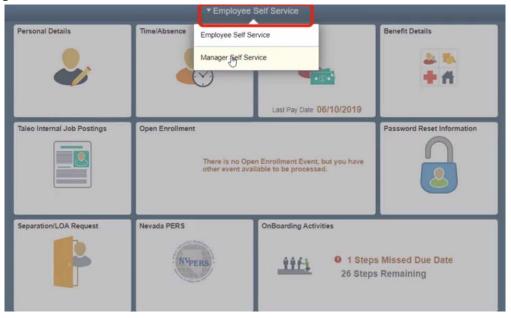
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\* Click on the headings above to be brought directly to that topic/page number in the guide

# 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.

	<ul> <li>Manager Self Service</li> </ul>	
Approvais	Timesheet Entry	Team Time/Absence
32		100 Exceptions
My Team	View Employee Personal Info	Team Talent Profile
Position Requests	Budget Planning Tool	Talent Acquisitions
Position Control Request	Manager Solf Service Reports	

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



# **User Preferences**

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

≡	ORACLE	Planning and Budgeting Cloud: CCSDBUD

2. Under Tools, click on User Preferences.

Navigator: Planners
Tasks Reports
💾 Approvals
Application
📋 Jobs
Tools
🍢 User Preferences
School Budget

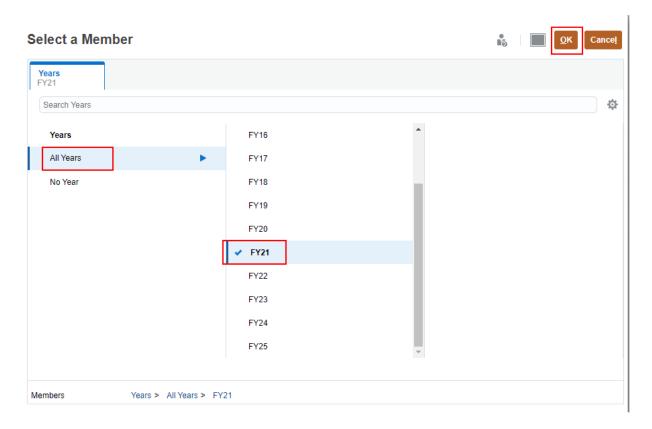
3. Click on User Variables:



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

			Save
User Variables			
Dimension	User Variable	Member	
Element	Context Element		C
Scenario	Current Scenario		
Version	Current Version		C <sub>C</sub>
Years	Current Year of View		
Element	School Fund Source		7 <sub>0</sub>
Scenario Version Years	Current Scenario Current Version Current Year of View		

5. From the Select a Member window, click on All Years, select the fiscal year, and click OK.



Note: If you do not select a fiscal year, you will not be able to access prior year budget plans.

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

		•	
User Variable	es		Save
Dimension	User Variable	Member	
Element	Context Element		Ç <sub>e</sub>
Scenario	Current Scenario		C <sub>2</sub>
Version	Current Version		P <sub>Q</sub>
Years	Current Year of View	FY21	P.2
Element	School Fund Source	FS_0235	7 <sub>2</sub>

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

Select a Member				
Element FS_0235				
Search Element				<b>‡</b>
Element		FS_0232	▶ ▲	
GL Measures	►	FS_0233	►	
FSGROUP	•	FS_0234	•	
		✓ FS_0235	Þ	

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

■ ORACLE <sup>®</sup> Planning #	nd Budgeting Cloud: CCSDBUD	User Prefer	ences	• :: •
Preferences				Save
General	User Variable	s		
Display	Dimension	User Variable	Member	
Notifications	Element	Context Element		9
Ad Hoc Options	Scenario	Current Scenario		80
User Variables	Version	Current Version		<i>6</i>
and a second sec	Years	Current Year of View	FY21	P.
Reports	Element	School Information		8
Form Printing		User Preferences have	been saved.	

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

	Planning and Budgeting Cloud: CCSDBUD			Â	8		abi
				~			
		User Preferences					
_							
Preferen	ices					Sav	e

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

## Accessing and Editing the School Budget

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



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

E ORACLE <sup>®</sup> Planning and Budgeting Cloud	e: CCSOBUD	Reports	Approvals	School Budget		~	A 0
Tasks: All Task Lists		_					Refresh
Name			-	Status	Start	End	Instructions
PREPARE BUDGETS				•			0
SCHOOL BUDGET				•			0
ES STAR STUDENT:TEACHER RATIO V	ALIDATION CHECK			•			0

3. Confirm you are accessing the correct work location in the Entity field. (This will be useful if you are assigned to multiple locations). *If* you need to change the work location displayed, click on the Entity link. From the Select a Member window, select your work location and click OK. Click the Go arrow to update the grid with your selected location's budget data.

SCHOOI	BUDG	ET 0	Save Refresh Actions -	<u>C</u> omplete <u>Provious</u>	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES		÷	/	¢
⊿ MAN	AGE PO	SITION/EMPLOYEE BUDGET by WORK LOCATION				
Version Working_SB				÷	/	٥
Administrat	ive License	ed Support Add'l Earnings Supplies and Other Svcs SLA				

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

	Save	<u>R</u> efresh	<u>A</u> ctions	s - Complete Previous Next Clos	e
		L_	G	View Fund Source to GL Allocations	
_			G	View Fund Source Supplies	
			G	Calculate Fund Source Supplies	
				Budget For	Þ
	🕞 Admin			Go To Full Screen	•
	🔓 Licensed 🔺		G	Update Admin, Licensed and Support subtotals	
ite	C Support			Filter	×
'n	G Supplies Other Se	rvices	۹	Analyze	
	1.00	100.0	٩)	New Ad Hoc Grid	
	0.50	100.0		Show Reasons for Read-Only Cells	
	0.50	100.0	<u>.</u>	Predictive Planning	
	0.00	100.0	+ - × +	Business Rules	
				Smart Push Details	
	1.50		₽₽	Grid Validation Messages	
				Spreadsheet Export	

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



## Navigating and Understanding the School Budget

6. 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).

Scenario Budget		ntity 235 Allen, DeanES										+	11	0
		ION/EMPLOYEE B	UDGET by WO	RK LOCATI	ON									
Version Norking SB												+	1	<
	ve Licensed S	Support Add'l Earnings Sup	plies and Other Svcs SL	A										
			Employee Name	Shared Position	Eff Start Date	e Eff S	top Date	Planned FTE	FS Percentag	ge Tot	al Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	Alle	ocation Pct	Gen Fund		
ELE PRINC	(9 MOS) - U7000	P_10026764_1 ELE PRINC (9	MOS) CCSD LastName,		7/24/1	19		1.00	100	00	100.00	151,057.92		
Admin Job		Total All Positions				_		1.00				151,057.92		
											5			
I SUMN	IARY TOTA	ALS						GenF Read by 3		-			GATE	_
				Gen Fund										
		IAINING BUDGET TO SPEND		(107,723.30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(190,428.81)	5,928.16	91,842	z.14
ALLOCATED	FUNDS:		FS Amount Actual Cost E			0.00	0.00	89.000.00	37,200,00		2,834,988,70	42,886.25	91.84;	

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

	175													
		ntity 235 Allen, DeanES												¢
MANAG	E POSIT	ION/EMPLOYEE B	UDGET by WOR	RK LOCATI	ON									
/ersion Vorking_S8												+	1	¢
Administrative	Licensed S	Support Add'l Earnings Sup	plies and Other Svcs SLA	A										
			Employee Name	Shared Position	Eff Start Date	Effs	itop Date	Planned FTE	FS Percenta	ge To	atal Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	A	liocation Pct	Gen Fund		
ELE PRINC (9	MOS) - U7000	P_10026764_1 ELE PRINC (9	CCSD MOS) LastName,		7/24/1	9		1.00	100	.00	100.00	151,057.92		
Admin Jobs		Total All Positions						1.00				151,057.92		
SUMMA	ARY TOTA	NLS		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title i	ZFS-EDIT	Food	GATE	
	REM	AINING BUDGET TO SPEND		(107,723.30		0.00	0.00	500.00	(88,205.51)					42.14
LLOCATED FU														
	All J	obs	FS Amount Actual Cost B	asis 2.355.966.6	6 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91.8	42.14
Target			29 C 27 C											

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

											_	
cenario Years Judget FY21	Entity 0235 Allen, DeanES									+	1	¢
MANAGE P	OSITION/EMPLOYEE B	UDGET by WO	RK LOCATI	ON								
/ersion Norking_SB										÷	1	¢
Administrative Lice	nsed Support Add'l Earnings Sup	plies and Other Svcs SI	A									
		Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percentage	e Total Fund Src	FS Amount Aver		
		Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	Allocation Pct	Gen Fund		
ELE PRINC (9 MOS)	- U7000 P_10026764_1 ELE PRINC (9	MOS) LastName,		7/24/1	9		1.00	100.0	0 100.00	151,057.92		
Admin Jobs	Total All Positions						1.00			151.057.92		
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SUMMARY	TOTALS											
SUMMART	TOTALS											
			Gen Fund	CSR		C.C.S. C.C.S.		A STATE OF A STATE OF	Title I 🔺 ZFS-EDI		GATE	
			(107 723.30	0.00	0.00	0.00	500.00	(00.200.01)	0.00 (195,428.81	5,928.16	91.84	614
ALLOCATED FUNDS:	REMAINING BUDGET TO SPEND											

9. 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.

CHOOL E	UDGET	0						<b>1</b> 0	we <u>R</u> efresh	Actions *	Complete	Next	Cļo
		ntity 235 Allen, DeanES									8		ŝ,
MANAG	E POSIT	ION/EMPLOYEE B	UDGET by WO	RK LOCATI	ON								
Version Working_SB											-	1	<
Administrative	Licensed 4	Support Add'l Earnings Sup	oplies and Other Svcs SL	A									
			Employee Name	Shared Position	Eff Start Date	e Eff	Stop Date	Planned FTE	FS Percentag	e Total Fund Sr	FS Amount Aver		
			Assumption	Assumption	Assumption	Ast	umption	Assumption	Gen Fund	Allocation Pc	Gen Fund		
ELE PRINC (9	MOS) - U7000	P_10026764_1 ELE PRINC (9	CCSD MOS) LastName,	3	7/24/	19		1.00	100.0	100.0	0 151,057.92		
Admin Jobs		Total All Positions						1.00			151,057.92		
SUMMA	RY TOTA	ALS		155 20 18	1 5553	1000000	2003 U				2004 - X.200 - X.5 - 11	2000	
				Gen Fund	CSR			GenF Read by 3				GATE	
		IAINING BUDGET TO SPEND		(107.723.30	0.00	0.00	0.00	500.00	(88.205.51)	0.00 (195.428.8	1) 5,928.16	91,8	42.14
ALLOCATED FU							-					22.2	
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BUDGET SPEN	n.				_	_	-						

10. 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.

								Sa Sa	Sec. 1 Section 200	- Andrews	ons 🔻	Complete Previous	and the second s	Clos
Scenario Budget		ntity 235 Allen, DeanES										+	1	¢
MANA	GE POSIT	ION/EMPLOYEE	UDGET by WO	RK LOCATI	ON									
Version Working_SB												+	1	0
Administrativ	ve Licensed	Support Add'l Earnings Sup	plies and Other Svcs SL	A										
			Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percenta	ge To	tal Fund Src	FS Amount Aven		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	AI	location Pct	Gen Fund		
ELE PRINC	(9 MOS) - U7000	P_10026764_1 ELE PRINC (9	MOS) LastName.		7/24/1	9		1.00	100.	00	100.00	151.057.92		
Admin Job	5	Total All Positions						1.00				151,057.92		
			_											
SUMN		ALS												
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	J ZFS-EDIT	Food	GATE	
	REN	AINING BUDGET TO SPEND		(107,723,30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,84	12.14
ALLOCATED	FUNDS:			-						_				
Target	All	lobs	FS Amount Actual Cost E	asis 2.355,966.6	6 352.822.04	0.00	0.00	89.000.00	37,200.00	0.00	2.834,988.70	42,886.25	91.8	12.14

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

cenario Years udget FY21	Entity 0235 Allen, DeanES								$\Rightarrow$		4
MANAGE P	OSITION/EMPLOYEE B	UDGET by WO	RK LOCATI	ON							
ersion Vorking_SB									÷	1	4
Administrative Licen	sed Support Add1 Earnings Sup	plies and Other Svcs SL	A								
		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	CCSD MOS) LastName.		7/24/19		1.00	100.0	0 100.00	151,057.92		
Admin Jobs	Total All Positions					1.00			151,057.92		
SUMMARY	TOTALS										
SUMMARY	TOTALS		Gen Fund	CSR	HOPE2 Magnet	GenF Read by 3	GenF SB178 1	itle I 🦼 ZFS-EDII	Food	GATE	
SUMMARY	TOTALS REMAINING BUDGET TO SPEND		Gen Fund (107,723.30		HOPE2 Magnet			1tle I a ZFS-EDI1 0.00 (195,428.81)			42 14
SUMMARY					and the second second second			1			

12. 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.

REMAINING BUDGET TO SPEND         (107.723.30)         0.00         0.00         500.00         (88.205.51)         0.00         (195.428.81)         5.928.16         9           ALLOCATED FUNDs:									10 C						
Werking _8B         Administrative       Licensed Support AddT Earrings Supples and Other Sixes SLA         Employee Name Shared Position Eff Start Date Eff Stop Date Planned FTE       F8 Percentage       Total Pund Src       F8 Amount Aver Assumption       Assumption												<b>→</b>	1	¢	
Norking_8B         Addministrative       Usersed Support Add1Earrings Supples and Other Social SLA         Imployee Name Shared Position       Eff Start Date       Planned FTE       F S Percentage       Total Fund Sre       SAmount Aver Gen Fund         CSSD CaSD CaSD CaSD Cast Name       Cast Name       Planned FTE       F S Percentage       Total Fund Sre       SAmount Aver Gen Fund         Addmin Jobs       Total All Positions       Cast Name       Cast Name <th colsp<="" td=""><td>MANA</td><td>AGE POSI</td><td>TION/EMPLOYEE B</td><td>UDGET by WO</td><td>RK LOCAT</td><td>ION</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th>	<td>MANA</td> <td>AGE POSI</td> <td>TION/EMPLOYEE B</td> <td>UDGET by WO</td> <td>RK LOCAT</td> <td>ION</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	MANA	AGE POSI	TION/EMPLOYEE B	UDGET by WO	RK LOCAT	ION								
Employee Name         Shared Position         Eff Start Date         Planned FTE         FS Percentage         Total Fund Sr.         FS Amount Aver Gen Fund           ELE PRINC (9 MOS) - U7000         P_10026764_1 ELE PRINC (9 MOS)         CGSD GENDame         7/24/19         1.00         100.00         1100.00         151.057.92           Admin Jobs         Total All Positions         Gen         Gen         Interview												+	1	0	
Assumption         Assumpt	Administrati	live Licensed	Support Add'l Earnings Sup	plies and Other Svos SL	A										
ELE PRINC (9 MOS) - U7000         P_10026764_1 ELE PRINC (9 MOS)         CCSD LastName.         7/24/19         1.00         100.00         151.057.92           Admin Jobs         Total All Positions         Image: Company of the state				Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percentag	e Total Fund Src	FS Amount Aver			
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Gen Fund         CSR         HOPE2         Magnet         Gen F SB178         Title1         J ZFS-EDIT         Food         G4           SUMMARY TOTALS         Gen Fund         CSR         HOPE2         Magnet         GenF SB178         Title1         J ZFS-EDIT         Food         G4           ALLOCATED FUNDs:         Gen Fund         CSR         HOPE2         Magnet         GenF SB178         Title1         J ZFS-EDIT         Food         G4	ELE PRING	C (9 MOS) - U700	0 P_10026764_1 ELE PRINC (9			7/24/1	9		1.00	100.0	100.00	151,057.92			
Gen Fund         CSR         HOPE2         Magnet         GenF SB178         Title1         # ZFS-EDIT         Food         GGA           REMAINING BUDGET TO SPEND         (107.723.30)         0.00         0.00         0.00         600.00         (88.205.51)         0.00         (195.428.81)         5.928.16         9           ALLOCATED FUNDS:	Admin Job	bs	Total All Positions						1.00			151,057.92			
Gen Fund         CSR         HOPE2         Magnet         GenF SB178         Title1         # ZFS-EDIT         Food         GGA           REMAINING BUDGET TO SPEND         (107.723.30)         0.00         0.00         0.00         600.00         (88.205.51)         0.00         (195.428.81)         5.928.16         9           ALLOCATED FUNDS:															
Gen Fund         CSR         HOPE2         Magnet         GenF SB178         Title1         # ZFS-EDIT         Food         GGA           REMAINING BUDGET TO SPEND         (107.723.30)         0.00         0.00         500.00         (88.205.51)         0.00         (195.428.81)         5.928.16         9           ALLOCATED FUNDS:															
REMAINING BUDGET TO SPEND         (107.723.30)         0.00         0.00         500.00         (88.205.51)         0.00         (195.428.81)         5.928.16         9           ALLOCATED FUNDS:	SUMN	MARY TOT	ALS												
ALLOCATED FUNDS:					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I 🦼 ZFS-ED	T Food	GATE	8	
		RE	MAINING BUDGET TO SPEND		(107,723.3)	0.00	0.00	0.00	500.00	(88,205.51)	0.00 (195,428.8	5,928.16	91,84	42.14	
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 42.888 25 9	ALLOCATED	FUNDS:													
	larget	All	Jobs	FS Amount Actual Cost E	Basis 2,355,966,6	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00 2.834,968.7	0 42,886.25	91,84	42.14	

13. 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.

									and the second second					-
Scenario Ye Budget FY		ntity 235 Allen, DeanES										ie)		¢
MANAG	E POSIT	ION/EMPLOYEE B	UDGET by WOF	RK LOCATI	ON									
/ersion Norking_SB												÷	1	¢
Administrative	Licensed	Support Add'l Earnings Supp	plies and Other Svcs SL/	۹.										
				Shared Position	Eff Start Date		top Date	Planned FTE	FS Percenta			FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	AI	location Pct	Gen Fund		
ELE PRINC (9	MOS) - U7000	P_10026764_1 ELE PRINC (9	CCSD MOS) LastName.		7/24/1	9		1.00	100.	.00	100.00	151.057.92		
Admin Jobs		Total All Positions				°		1.00				151,057.92		
⊿ SUMMA	RY TOTA	LS												
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	J ZFS-EDIT	Food	GATE	
	REM	AINING BUDGET TO SPEND		(107,723.30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,8	42.14
ALLOCATED FU	NDS:													
Target	All J	obs	FS Amount Actual Cost B	asis 2,355,966.6	8 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,8	42.14

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

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

SCHOOL	BUDGET	0						<b>S</b>	ive <u>R</u> efresh	Acti	ions 🔻 📔 🗌	Complete Previo	us	<u>i</u> ext	Close
Scenario Budget		Entity 235 Allen, DeanES											•	/	¢
MANA	GE POSIT	ION/EMPLOYEE B	UDGET by WOR	K LOCATI	ON										
Version Working_SB													÷	/	¢
Administrativ	ve Licensed	Support Add'l Earnings Sup	plies and Other Svcs SLA												
			Employee Name S	hared Position	Eff Start Date	Eff	Stop Date	Planned FTE	FS Percenta	ige To	otal Fund Src	FS Amount Aver			
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	A	llocation Pct	Gen Fund			
ELE PRINC	(9 MOS) - U7000	P_10026764_1 ELE PRINC (9	MOS) CCSD LastName,		7/24/1	19		1.00	100	.00	100.00	151,057.92			
Admin Job	s	Total All Positions						1.00				151,057.92			
	IARY TOT	ALS													
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	c	GATE	
	REN	AINING BUDGET TO SPEND		(107,723.30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16		91,842	.14 🔺
ALLOCATED	FUNDS:														
Target	All J	Jobs	FS Amount Actual Cost Bas	sis 2,355,966.6	6 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25		91,842	.14
BUDGET SPE	ENT:														

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

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

CHOOL	BUDGE								<b>S</b>	ave <u>R</u> efresh	Acti	ions 🔻 📃 <u>C</u> or	mplete Previous	Next	Clos
	Years FY21	Entity 0235 Allen, DeanES											÷	/	¢
MANA	GE POS	ITION/EMPLOYE	E BUDGET	by WORK	LOCATIO	N									
Version Working_SB													+	1	¢
Administrative	Licensed	Support Add'l Earnings	Supplies and Oth	er Svcs SLA											
				Emp Name E	S Amount Prep E	In ES Am	ount Add	On ES	Amount Extra						
				Assumption	Gen Fund	- C.	en Fund		Gen Fund						
		LICENSED ADDITIONAL	ARNINGS TOTAL		7,597	02	6,081	.65	1,297.35						
PE INSTR A	SST - N0179	P_10008407_1 PE INSTR	ASST	CCSD LastName,			7,176	.67	8.052.08						
		SUPPORT ADDITIONAL E	ARNINGS TOTAL	CCSD LastNama			7,176	.67	8,052.08						
	ARY TO	TALS													
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	GATE	
		EMAINING BUDGET TO SP	END		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,8	12.14
ALLOCATED F		II Jaka	EC Amount	Astual Cost Real	s 2.355,966.66	252 222 04	0.00	0.00	80.000.00	27 200 00	0.00	2 924 089 70	10 000 05	01.0	12.14
Target	A	II Jobs	F5 Amount	Actual Cost Basi	s 2,300,900.00	352,622.04	0.00	0.00	89,000.00	37,200.00	0.00	2.834,988.70	42,886.25	91,84	+2.14

- 16. 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.

	0.0.0.7								16 S	ave <u>R</u> efresh	- Men	ons 👻 🗌 <u>C</u> o	mplete Britvious	Next	Clos
	ars (21	Entity 0235 Allen, DeanES											-	1	¢
MANAG	E POS	SITION/EMPLOYEE	BUDGE	T by WORK	LOCATIO	N									
ersion Vorking_SB													+	1	¢
Administrative 🐘	Licensed	Support Add'l Earnings	Supplies and (	Other Svcs SLA											
Period BegBalance													+	1	¢
			Gen Fund	GenF Read by 3	CSR	GenF SE	178	GATE	Sp Ed						
Enter total yea	r dollar an	nount to a Funding Source:													1
5116540000 Ex	tra Duty L	lcensed													
5116810000 Pr	eparation	Periods		88.500.00		37.2	00.00								
5117952000 Ex	tra Duty S	upport Staff													
5118259000 Ex	tra Duty A	dministrator													
5320000000 Ed	ducation S	ervices													
5330000000 Er	mployee Tr	raining													
534000000 Of	ther Profes	ssional Services													
5343000000 Le	gal Servic	:09													
£244000000 Ar	oblitesture	I Carviana Drafi													
SUMMA	RY TO	TALS													
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	GATE	
	1	REMAINING BUDGET TO SPE	ND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,84	42.14
LLOCATED FU	NDS:				-										
arget	4	All Jobs	FS Amou	nt Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37 200.00	0.00	2,834,988.70	42,886 25	91,84	42.14
UDGET SPENT															

- 17. 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 E	BUDG	ET O							s s	ave Refresh	Actions -	Complete Previ	ous Next	Close
	Years FY21	Entity 0235 Allen, DeanES											+ /	0
MANAC	GE PO	SITION/EMPLOYEE	BUDGET by	WORK	LOCATIO	N								
Version Working_SB													+ /	¢
Administrative	License	d Support AddT Earnings Su	piles and Other Svcs	SLA										
			Gen Fund											
ESD - Acader	mic Cent	ers	0.00											
ESD - Attenda	lance Off	cers	4,274.42											
ESD - Correct	tional Sc	hools	6,518.66											
ESD - Substa	ance Abu	se (SAAP) Instructors	117.28											
FD - Landsca	ape Maint	enance	19.652.28											100
SSD - Gifted	and Tale	nted Education Specialists	65,284.31											
TRANSP - Ge	eneral Ed	ucation Transportation	22,772.30											
Total Service	Level Aq	preements	124,905.52											
	ARY 1	OTALS							on na ann an thair an					
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I / ZFS-	EDIT Food	GAT	E
		REMAINING BUDGET TO SPEND			(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00 (195,42)	5,928 16	91,	842.14
ALLOCATED FI	UNDS:							_						
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 2,834,98	18.70 42,886.25	5 91,	842.14
BUDGET SPEN	IT:													

18. The Summary Totals area contains a running total of each tab available in the School Budget form. This includes Administrative, Licensed, Support, Additional Earnings, et cetera. It provides total dollar amounts by each tab type, and from what funding source they are being taken. Any cells appearing in red delineate a negative balance, which must be reconciled before a budget scenario can be promoted for review and approval.

			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF 5B178	Title I	# ZFS-EDIT	Food
	REMAINING BUDGET TO SPEND		(107,723,30)	0.00	0.00	0.00	500.00	(88.205.51)	0.00	(195.428.81)	5.928.16
ALLOCATED FUNDS:											
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25
BUDGET SPENT:											
Working_SB	Admin Jobs	Total Funding Amount	151.057.92							151.057.92	
	Licensed Jobs	Total Funding Amount	1.675.904.69	352,822.04			0.00	88,205.51		2,116,932.24	
		FS Amount Prep Buy	7,597.02							7,597.02	
		FS Amount Add-On	6,081.65							6.081.65	
		FS Amount Extra	1,297.35							1.297.35	
	Support Jobs	Total Funding Amount	434,978.16					0.00		434,978.16	36,958.09
		FS Amount Add-On	7.176.67							7.176.67	
		FS Amount Extra	8,052.08							8,052.08	
	All Jobs	Supplies and Other Services	46,638.90				88,500.00	37,200.00		172,338.90	
		Service Level Agreement	124,905.52							124,905.52	
TOTAL BUDGET SPENT			2,463,689.96	352,822.04			88,500.00	125,405.51		3.030.417.61	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

# 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:

SCHOOL BUI	GET O	
Scenario Years Budget FY21	Entity 0235 Allen, Dea	nES
G View Student Te	eacher Ratio Validation	OYEE BUDGET by WORK LOCATION
🕼 Calc Total Posit	ion Costs	
Mass Calc		rnings Supplies and Other Svcs SLA

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

#### SCHOOL BUDGET <sup>1</sup>

SB Home > Student Teacher Ratio Validations Scenario Version Entity Years Working\_SB FY21 Budget 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

10

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

SCHO	OL BUDGE	T O				nő.	Save Refres	sh <u>A</u> c	tions 😽	
SB Home	> Student Teacher	Ratio Validations								
Scenario Budget	Version Ye Working_SB F	Y21	6						/	1
			ST Ratio Limit	Students	Difference					
Elementary	Star 1 or 2 Schools									
Elementary	Star 3 or 4 or 5 Scho	ools								
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					
01-1-041/5										
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. <u>Add-on Approval Form</u>

SCHOOL	BUDGET	0
--------	--------	---

SB Home	> Student Teach	ier Rati	o Validations			
Scenario Budget	Version Working_SB	Years FY21				
				ST Ratio Limit	Students	Difference
Elementary S	Star 1 or 2 School	ls				
Elementary S	Star 3 or 4 or 5 So	chools				
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	o update the ratio	IS				

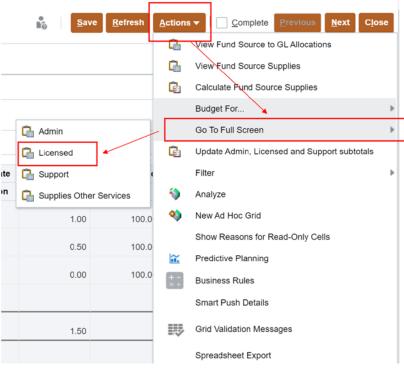
Save <u>R</u>efresh <u>A</u>ctions

#### 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:

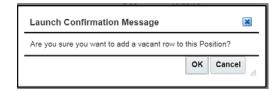
- The User cannot select a "Vacant" position since they can simply update the *Hours* (Support Professionals) or *FTE* (Licensed and Admin) of the position to increase the count and budget cost
- The Vacant position created by the Feature will use the *same funding* source allocation of the existing 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
  - o Primary Pay Rate will use the Average Salary Rate for the Vacant position
- From the SB Home page navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab).



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

	BUDGE		ensed Transf	6	Transfer Position Calc Total Position Costs		Save Refresh Actions				1 🗆 🕬	mplete	Provinces Next	Close
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES		Mass Calc						1	0	Data Ad hoc	Format
	1			G	Update Funding Source Allocations Edit Position Info	•		Shared Position	Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce
				G	Go to Licensed Summary		1	Assumption	Assumption	Assumption	Assun	ption	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_1000	8381_1 KDG 1 AM/1 PM	G	View Fund Source to GL Allocations		M_325191		8/7/19			1.00	100.00	-
				G	View Fund Source Supplies		M_331715		8/7/19			1.00	100.00	
				G	Calculate Fund Source Supplies		M_516040		8/7/19			1.00	100.00	
GRADE 1 - 0	C1010	P_1000	8382_1 GRADE 1		Budget For		A New Po	sition	/19			1.00		
				Ch	Delete Position Info	-	-		/19			1.00		
				451			Prep Buy		/19			1.00		
					Go To Full Screen	. *	Add-On a	nd Extra - Licensed	0/20			0.00		
		New Po	sition 8	G	Analyze and Fix GL Allocations		Add-On a	nd Extra - Support				1.00		
GRADE 2 - 0	C1020	P_1000	8383_1 GRADE 2		Edit		Job2- Sup	port Staff	/19			1.00	100.00	
		P_1000	8384_1 GRADE 2		Adjust		CTT - Sut	Taashar	/19			1.00		
		New Po	sition 5						-			1.00		
ARL-ELEM,	2ND - C1025	P_1000	8385_1 ARL-ELEM, 2ND	1	Supporting Detail		Increase I	Position Headcount	/19			1.00	100.00	

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



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

SCHOOL BUDGET

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Alien, DeanES						1	٥	Data Ad hoc	Format
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned	FTE		FS Pero
					Assumption	Assumption	Assumption	Assumption	Assum	ption	Gen Fund	CS
KDG 1 AM/1	PM1 - C1000	P_10000	3381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19			1.00	100.00	-
				Employee 2	CCSD LastName, FirstName EM_331715		8/7/19			1.00	100.00	
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19			1.00	100.00	
				Vacant			8/7/19			1.00	100.00	
GRADE 1 - C	01010	P_1000	382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19			1.00		
				Employee 2	CCSD LastName, FirstName EM_303745		8/7/19			1.00		
				Employee 3	CCSD LastName, FirstName EM_553069		8/7/19			1.00		
				Employee 4	CCSD LastName, FirstName EM 524230	-	2/20/20			0.00		

Save Refresh Actions - Complete Previous Next Close

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

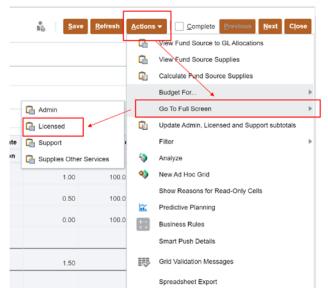
	L BUDGE					Q	Transfer Position	10	Save Refre	sh Actions -	<u>م</u> [] [	mplete	<u>Previous</u> <u>N</u> ext	Close
	>SB Position In SB Position In	Years	Entity			G	Calc Total Position Costs							
Scenario Budget	Version Working_SB	FY21	0235 Allen, DeanES				Mass Calc				/	0	Data Ad hoc	Format
				Update Funding Sou		b s n	Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce		
						100	and the state of states as	ion	Assumption	Assumption	Assur	nption	Gen Fund	CSF
KDG 1 AM/1	PM1 - C1000	P_10008	3381_1 KDG 1 AM/1 PM	Employee 1	*ccsp	G	View Fund Source to GL Allocations		8/7/19			1.00	100.00	( <u>+</u> )
				Employee 2	CCSD	Ch.	View Fund Source Supplies		8/7/19			1.00	100.00	
				Employee 3	CCSD	Q	Calculate Fund Source Supplies		8/7/19			1.00	100.00	
				Vacant			Budget For		8/7/19			1.00	100.00	

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

SCHOOL	CHOOL BUDGET 1 Save Refresh Actions -							Complete	Previous Next	Close	
SB Home :	> SB Position Ir	fo Detail-Licen	sed Transf								
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						/ 0	Data Ad hoc	F <u>o</u> rmat
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percei
					Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR
KDG 1 AM/1 P	M1 - C1000	P_100083	81_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		1.00	100.00	<u>^</u>
				Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00	
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00	
				Vacant			8/7/19		1.00	100.00	

# Adding and Adjusting Positions

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



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

				hõ	Save Refresh	Actions	Complete Previous	Next	Clos
SB Home > SB Position Info D           Scenario         Version         Yes           Budget         Working_SB         FY2	ars Entity					G	Calc Total Position Costs Mass Calc		F <u>o</u> rm
			Employee Name	Shared Position	Months Work Override	G	Update Funding Source Allocations Edit Position Info	► B	
			Assumption	Assumption	Assumption	G	Go to Licensed Summary		
RST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFT	YAST Employee 1	CCSD LastName. FirstName EM_542377		09 Months	G	View Fund Source to GL Allocations		1
ELEM SCHOOL CLERK - N0143	P_10008404_1 ELEM SCHOO	L CLERK Employee 1	CCSD LastName. FirstName EM_317741		11 Months	G	View Fund Source Supplies		
SCH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE M	ANAGE Employee 1	CCSD LastName, FirstName EM_548030		11 Months	D	Calculate Fund Source Supplies		
COMPUTER TECH I - N1555	P_10008412_1 COMPUTER T	ECH I Employee 1		0			1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 - 1000 -	- 1	
	P_20003817_1 COMPUTER T	ECH I Employee 1	CCSD LastName, FirstName EM_1005897	A New Position	n	-	Budget For	- 1	
CUSTODIAN - N8040	P_10005637_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_1020044	Prep Buyout -	Licensed	C)	Delete Position Info		
	P_10008413_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_1020076	Add-On and E	xtra - Licensed		Go To Full Screen	- 1	
ID CUST I - N8110	P_10008414_1 HD CUST I	Employee 1	CCSD LastName, FirstName EM_317295	Add-On and E	xtra - Support	Ch	Analyze and Fix GL Allocations	- 1	
CHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	Employee 1	CCSD LastName, FirstName EM_1004139:	Job2- Support	Staff.		Edit	- 1	
IBRARY AIDE - N0105	P_10008402_1 LIBRARY AIDE	Employee 1	CCSD LastName, FirstName EM_1002838	- Anna ann an ann an ann an an an an an an				- 1	
	P 10008403 1 LIBRARY AIDE	Employee 1	CCSD LastName FirstName EM 1002838	CTT - Sub Tea	cher		Adjust	- *	

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

OD HOME	> SD POSIBO	n mo Detail-Su	pport Transf > SB	Add Position	_								
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, DeanE	Job PE INSTR A	SST - N0179					1	🗘 Data Ac	i hoc For
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			FS P	ercentage	
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE

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

Select a Member				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		

5. After changing a position, the **Job** link will show in yellow to indicate that the data in the form needs to be updated. Click the **Go** arrow to update (this will remove the yellow highlight).

SB Home	> SB Positio	n Info Detail-Su	pport Transf > SB	Add Position					<u>S</u> ave	Construction of Construction	
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Dea	Job TI INS ASST	111 - 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	

6. Click the Actions menu and select Add Position.

SB Home :	> SB Positio	n Info Detail-Sur	pport Transf > SB	Add Position							R	Add Position	
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity	nES TI INS ASST	' III - N0198						Calc Total Position Costs Edit Position Info	Form
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			View Fund Src to GL Allocations Filter		
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF R by 3		Sort	► ATE

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.

		* Ent	er proposed number of FTE to		
* Enter proposed number of FTE to purchase	1		Is 100% to General Fund	100	
* Select FROM Job Code	"N0198"	ç <sub>ç</sub>	* Default is 1 for Primary job with EGI. Enter 2 if	1	
* Enter Default as VACANT	Vacant		Secondary job and no EGI.		

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.

	SB Position In	520524 Alamana ang ang ang ang ang ang ang ang ang	oport Transf > SB	Add Position					Save	Refresh Acti	ons 🔻 🗌 Com	lete Breviou	Next Clo
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Dean	Job ES TI INS ASST	III - N0198					1	O Data	Ad hos Ferm
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date					
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SB178	Magnet	Title I
Support Only-	Enter #Months a	and Hours						_					
New Position (	5		Variant	1.00	09 Months	6.00			-		100.00	-	

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

CHOOL	BUDG	ET 0			×				Save	Refresh	ions -	Denvine	Next Close
				C)	Add Position	1.			10	Reneau		oto Electrica	Heat close
SB Home	> SB Positio	n Info Detail-Su	pport Tra	G	Calc Total Position Costs							-	
Period BegBalance	Years FY21	Scenario Budget	Ver Wo	0	Edit Position Info	0198					1	O Data	Ad hoc Format
			Emp Na	G	View Fund Src to GL Allocations Edit	ours Per <sub>P</sub> y Override	Eff Start Date	Eff Stop Date					
			Assur	*#	Adjust Supporting Detail	sumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SB178	Magnet	Title I
Support Only-	Enter #Mont	hs and Hours		8	Supporting Detail Change History								
New Position	6		Vacati	â	Lock/Unlock Cells		100				103.00		

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

SB Home >	SB Position	Info Detail-Su	pport Transf > SB	Add Position										
Period legBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Dea	nES TI INS ASST	TIII - N0198						/	Data	Ad hoc For
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date						
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SE	3178	Magnet	Title I
upport Only-	Enter #Month	s and Hours												

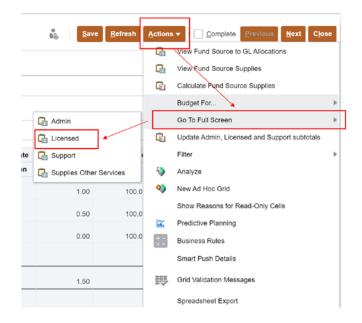
11. Confirm the dollar amount calculated in the fund source column desired and click Save to aggregate this new amount in the Summary Totals. After you save, click the SB Home link to return to the School Budget form and review the updated totals in the summary.

SB Home 3 SB Posi	ion Info D	etail-Support Transf										
Scenario Version Budget Working		ars Entity 21 0235 Allen, DeanE	s							/	O Data Ad I	hoc Form
					intage	FS Perce	intage	Total Fund Src	FS Amount Avera	age Cost Basis	FS Amount Actua	il Cost Basis
					GenF SB178	Food	Sp Ed	Allocation Pct	Gen Fund	GenF SB178	Food	Sp Ed
		P_10008410_1 INSTRUCTIO	ONAL AST	Employee 1				100.00	5,231,18			
TI INS ASST III - N0198	8	New Position 6		Vacant	100.00			100.00		31,779.25		
FS WKR FLOATER - N	010	P_10008415_1 FS WKR FLC	DATER	Employee 1		100.00		100.00		0 <u>.</u>	0.00	
SR FOOD SRVC WRKF	- N5030	P_10023567_1 SR FOOD SI	RVC WRKR	Employee 1		100.00		100.00			38,958.09	
		FORM TOTALS			100 00	305.00	1.000		445.258.48	31,779.25	36,958.09	158.69

#### Change the Funding Source of a New Position

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

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



 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.

SB Home	> SB Position In	nfo Detail-Lice	ensed Transf							R	Transfer Position	
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES							Q	Calc Total Position Costs	For
					Employee Name	3	Shared	Eff Start Date	Ef	_	Mass Calc	FS F
						1	Adm	in New Positions		L	Update Funding Source Allocations	1
					Assumption	As	Lice	nsed New Positions		G	Edit Position Info	
KDG 1 AM/1 F	1 AM/1 PM1 - C1000 P_10008381_1 KDG 1 AM/1 PM				CCSD LastName, FirstName EM_325191	1	Ch Sup	port New Positions		C.	Go to Licensed Summary	
				Employee 2	CCSD LastName, FirstName EM_331715			lew Positions	1	0	View Fund Source to GL Allocations	
				Employee 3	CCSD LastName, FirstName EM_516040			8///19	1	Ch.	View Fund Source Supplies	
BRADE 1 - C	1010	P_10008	382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323			8/7/19		(C)	Calculate Fund Source Supplies	
				Employee 2	CCSD LastName, FirstName EM_303745			8/7/19		-	11 (55) (5775) (5	
				Employee 3	CCSD LastName, FirstName EM_553069			8/7/19			Budget For	*
GRADE 2 - C	1020	P_10008	383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411			8/7/19		G	Delete Position Info	
		P_10008	1384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954			8/7/19			Go To Full Screen	
		New Pos		Vacant	Vacant					C,		

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

CHOOL BUDO			Edit Funding Source					\$ S•	ve <u>R</u> efresh	Actions +	Complete Brev	ious Next C	lose
SB Home > SB Posit Scenario Budget Version Working	Ye	pars Y21	Calc Total Position Costs	•							/ O Pe	Ad hoc Fo	emat
			Adjust Supporting Detail		Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	Total Comp Exp	FS Percentage	Total Fund Src	FS Amount Average Cost Basis	
			and the state of the second seco		Assumption	Assumption	Assumption	Assumption		GenF SB178	Allocation Pct	GenF SB178	
I INS ASST III - N0198	New F	Positi	Lock/Unlock Cells	1				0.56	31,779,25	100.00	100.00	31,779.25	1 ^
Licensed Jobs	Total	New	Filter	*				1.00	88,205.51			88,205.51	1
			Sort										
			Analyze	1									

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

SB Home > S		3	st > SB New Pos Edit AIU	obs > SB Edit Por	stion FSAlloc			<b>1</b> 6 <b>5</b> 4	ive Refresh	Actions 🔻	<u>C</u> omplete	Previo	uii <u>N</u> ext	Close
Scenario Y	'ears Y21	Entity 0235 Allen, DeanES	Job	Position	Employee	/				3	0	Data	Ad hoc	Forma
		Employee FS Percentage Name						Pay Base	Pay Cycle	Primary Pay Rate	Dist Average		Budget Sta Date	rt
	Assumpti	ion Gen Fund	GenF Read	CSR (	GenF SB178	GATE	Sp Ed	Assumption	Assumption	Assumption	Assum	ption	Assumptio	1
Strategic Budget	Vacant	100	00					Houriy	Biweekly	15	36	15.86	7/1/20	

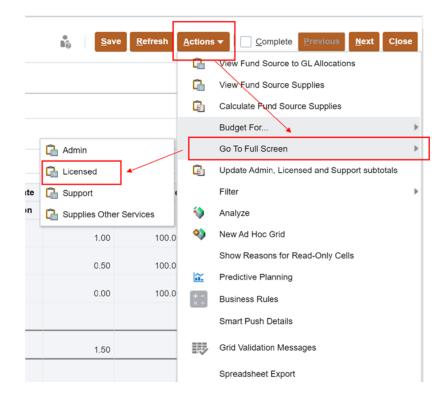
5. Click the **SB Position Info Detail-Support** link. Confirm that the new position is now budgeted to the updated funding source and click **Save**.

SB Home	o > SB Position In	o Detail-Su	pport Transf									
icenario ludget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES							1	O Data	Ad hoc Form
					urs Per Override	Eff Start Date	Eff Stop Date	FS Percentage	FS Percer	ntage	Total Fund Src	FS Amount Average Cost Basis
					umption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund
NSTRUCT	ONAL AST - N019	0 P_10	008409_1 INSTRUCTIONAL A	ST Employee 1	5.00	12/22/19		1		100.00	100.00	
		P_10	008410_1 INSTRUCTIONAL A	ST Employee 1	1.50	12/22/19		100.00			100.60	5,231.18
I INS ASST	III - N0198	New	Position 6	Vacant	6.00			100.00			100.00	31,779.25
S WKR FL	OATER - N5010	P_10	008415_1 FS WKR FLOATER	Employee 1	0.00	12/22/19			100.00		100.00	
R FOOD S	RVC WRKR - N5	30 P_10	023567_1 SR FOOD SRVC W	RKR Employee 1	5.50	12/22/19			100.00		100.00	
			M TOTALS					12 C				477.037.73

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

#### Removing a Position

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



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

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						/ 0	Data Ad hos	Format
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percer
					Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR
KDG 1 AM/1	0G 1 AM/1 PM1 - C1000	P_1000	8381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		0.00	100	
			P_10008381_1 KDG 1 AM/1 PM	Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00	
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00	
GRADE 1 - C	01010	P_1000	8382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		1.00		
				Employee 2	CCSD LastName, FirstName EM_303745	-	8/7/19		1.00		
				Employee 3	CCSD LastName, FirstName EM_553069	-	8/7/19		1.00		
GRADE 2 - C	21020	P_1000	8383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411	-	8/7/19		1.00	100.00	

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

CHOOL	LBUDGE	тО				-	^	6	Save Refre	sh Actions -		mplete	Brevious	t Close
						Q	Transfer Position							
SB Home	> SB Position In	nfo Detail-Licen	ised Transf			Q.	Calc Total Position Costs						11.11	
Scenario Budget	Version Working_S8	Years FY21	Entity 0235 Allen, DeanES				Mass Calc	×			1	¢	Data Ad hoc	Format
						G	Update Funding Source Allocations Edit Position Info Go to Licensed Summary		Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce
							2012/00/00/00/00/00/00/00/00/00/00/00/00/00	pm	Assumption	Assumption	Assur	nption	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_100083	81_1 KDG 1 AM/1 PM	Employee 1	CCSD	G	View Fund Source to GL Allocations		8/7/19			0.00	10	-
				Employee 2	CCSD	Ch.	View Fund Source Supplies		8/7/19			1.00	100.0	2
				Employee 3	CCSD	G	Calculate Fund Source Supplies		8/7/19			1.00	100.0	2
GRADE 1 - C	01010	P_100083	82_1 GRADE 1	Employee 1	CCSD		Budget For		8/7/19			1.00		
							bouger i ei							

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

SB Home > SB Position In	fo Detail-Licensed Transf									
Scenario Version Budget Working_SB	Years Entity FY21 0235 Allen, Dean	ES						1	© Data	Ad hoc Format
			F	S Percentage		FS Perc	entage	Total Fund Src	FS Amou	int Average Cost B
			Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocation Pct	Gen Fund	CSR
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 F	M Employee 1	100					100.00	0.00	
		Employee 2	100.00					100.00	88,205.51	
		Employee 3	100.00					100.00	88,205.51	
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1		100.00				100.00		88,205.51
		Employee 2		100.00				100.00		88.205.51
		Employee 3		100.00				100.00		88,205.51
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	100.00					100.00	88.205.51	
	P_10008384_1 GRADE 2	Employee 1		100.00				100.00		88,205.51

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

Save	Refresh Action	ns 🔻 🖸 Complete Previous Mext Clos	se
	G	View Fund Source to GL Allocations	
	G	View Fund Source Supplies	
	G	Calculate Fund Source Supplies	
		Budget For	Þ
🕒 Admin		Go To Full Screen	Þ
Licensed	• B	Update Admin, Licensed and Support subtotals	
te 📴 Support		Filter	Þ
n 🕞 Supplies Other	Services 😜	Analyze	
1.00	100.0 🔌	New Ad Hoc Grid	
0.50	100.0	Show Reasons for Read-Only Cells	
	<b>a</b>	Predictive Planning	
0.00	100.0	Business Rules	
		Smart Push Details	
1.50	IŲ	Grid Validation Messages	
		Spreadsheet Export	
		Open in Smart View	

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

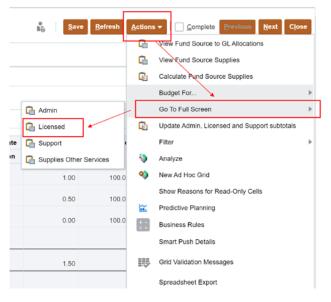
	Detail-Support Transf						_		_
Scenario Version Ye Budget Working_SB FY	ars Entity 21 0235 Allen, DeanES					/	e o Pe	Ad hoc F	ormat
			Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	P
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	0
PTA II - N0162	P_10008406_1 SPTA II	Employee 1	CCSD LastName, FirstName EM_10049345		09 Months	0.00	1/19/20		-
			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		
E INSTR ASST - N0179	P_10008407_1 PE INSTR ASST	Employee 1	CCSD LastName, FirstName EM_10022402		09 Months	0.50	12/22/19		
	P_10008408_1 PE INSTR ASST	Employee 1	CCSD LastName. FirstName EM_10022402		09 Months	6.00	12/22/19		1.
NSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473		09 Months	5.00	12/22/19		
	P_10008410_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473		09 Months	1.50	12/22/19		
I INS ASST III - N0198	New Position 6	Vacant	Vacant		09 Months	6.00			
S WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1	CCSD LastName, FirstName EM_10049345		09 Months	0.00	12/22/19		
R 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		

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

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES								1	¢	Qata Ad hoc	Form
					op Date	FS Percentage	FS Per	sentage	Total Fund Src	FS Amount Average Cost Basis		FS Amou	ant Actual Cost Basi	s
					Imption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund		Food	Sp Ed	
		P_200	003817_1 COMPUTER TECH I	Employee 1		100.00			100.00	34,369	.40			
USTODIAN	- N8040	P_100	005637_1 CUSTODIAN	Employee 1		100.00			100.00	45,833	62			
		P_100	008413_1 CUSTODIAN	Employee 1		100.00			100.00	45,833	.62			
D CUST I -	N8110	P_100	008414_1 HD CUST I	Employee 1		100.00			100.00	63,512	33			
CHOOL AIE	DE - N0100	P_100	08401_1 SCHOOL AIDE	Employee 1		100.00			100.00	33,005	.38			
IBRARY AID	DE - N0105	P_100	008402_1 LIBRARY AIDE	Employee 1		100.00			100.00	8,846	.28			
		P_100	008403_1 LIBRARY AIDE	Employee 1		100.00			100.00	21,992	.43			
SPTA II - NO1	162	P 100	08406_1 SPTA II	Employee 1	- 3			100.00	100.00		_	_		0.00

#### Transfer to Existing Position

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



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

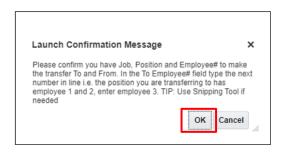
	1												Contract of the local division of the local	and the second se	
Scenario Version Budget Working_SB	Years Entry FY21 0235 Alten, DeanES											/	O Data /	Ad hoc Format	
			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percentage		FS Perc	entage	Total Fund Src	FS Amos	
	· · · · · · · · · · · · · · · · · · ·		Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE	So Ed	Allocation Pct	Gen Fund	
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		1.00		100.00				100.00	*	Transfe
		Employee 2	CCSD LastName, FirstName EM_303745		8/7/19		1.00		100.00				100.00		1st Gra
		Employee 3	CCSD LastName, FirstName EM_553069		8/7/19		1.00		100.00				100.00		Positie
		Employee 4	CCSD LastName. FirstName EM_524230		2/20/20		1.00		100.00				100.00	- 10	
	New Position 8	Vacant	Vacant				1.00		100.00				100.00		
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411		8/7/19		1.00	100.00					100.00	88,205 t	
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName. FirstName EM_520954	-	8/7/19		1.00		100.00				100.00		
	New Position 6	Vacant	Vacant				1.00			100.00			100.00		
ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Employee 1	CCSD LastName, FirstName EM_10064404	-	8/7/19		1.00	100.00					100.00	.88,205.5	
3RADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305		7/1/20		1.00	100.00					100.00	88.205.t	Transf
		Employee 2	CCSD LastName, FirstName EM_502600	-	8/7/19		1.00	100.00					100.00	88,205.5	Gener
		Employee 3	CCSD LastName. FirstName EM_524230	1	2/20/20		1.00	100.00					100.00	80.205.5	10008
3RADE 4 - C1040	P_10008387_1 GRADE 4	Employee 1	CCSD LastName, FirstName EM_10109611		7/1/20		1.00	100.00					100.00	88,205.5	
		Employee 2	CCSD LastName, FirstName EM_316074	-	8/7/19		1.00	100 00					100.00	88,205.5	

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

SCHOOL	BUDGET	0

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		FS
					0	Transfer Position		Postori							
					G	Calc Total Position Costs		Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE
GRADE 1 - C	1010	P_10008	382_1 GRADE 1	Employee 1	~	Mass Calc			8/7/19		1.00		100.00		
				Employee 2					8/7/19		1.00		100.00	5	
				Employee 3		Update Funding Source Allocations	1		8/7/19		1.00		100.00	8	
				Employee 4	G	Edit Position Info	- 11		2/20/20		1.00		100.00	6	
	New Position 8 Vacant		Vacant	G	Go to Licensed Summary	- 0				1.00		100.00	8		
GRADE 2 - C	1020	P_10008	383_1 GRADE 2	Employee 1	G	View Fund Source to GL Allocations	εĽ		8/7/19		1.00	100.00			
		P_10008	384_1 GRADE 2	Employee 1	G	View Fund Source Supplies			8/7/19		1.00		100.00		
		Vacant							1.00			100.00			
ARL-ELEM, 2	ND - C1025	P_10008	385_1 ARL-ELEM, 2ND	Employee 1	0	Calculate Fund Source Supplies			8/7/19		1.00	100.00			
GRADE 3 - C	1030	P_10008	386_1 GRADE 3	Employee 1		Budget For			7/1/20		1.00	100.00			
				Employee 2	C)	Delete Position Info			8/7/19		1.00	100.00			
				Employee 3		Go To Full Screen			2/20/20		1.00	100.00			
GRADE 4 - C	1040	P_10008	387_1 GRADE 4	Employee 1	G	Edit Position Detail	1		7/1/20		1.00	100.00			
				Employee 2	-				8/7/19		1.00	100.00			
			Vacant	G	Analyze and Fix GL Allocations			7/1/20		1.00	100.00				

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



5. 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:

Tran	sfer Position				₿. No	Launch	<u>C</u> ancel
	* Select FROM Employee	"Employee 1"	R <sub>C</sub>	* Select TO Employee	"Employee 4"		۲ <u>۰</u>
	* Select FROM Job Code	"C1010"	2	* Select TO Position	"P_10008386_1"		<u></u> ₹
	* Select FROM Position	"P_10008382_1"	2	* Select TO JOB	"C1030"		6

**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".

Save Refresh

6. When the process is done, the budget form will highlight the updated position rows in yellow. Note that the FROM position FTE is zero, the TO position created a row with the next Employee number in line (Employee 4):

													and the second se	
Scenario Version Budget Working_SB	Years Ently FY21 0235 Allen, 0	anES										/	O Data	Ad box Fge
			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	1	S Percentage		FS Perc	.entage	Total Fund Src
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Oen Fund	CSR	Oen# 58178	Oen GATE	50.00	Allocation Pct
CDG 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					100
		Employee 2	CCSD LastName, FirstName EM_331715			8/7/19		1.00	100.00					100
		Employee 3	CCSD LastName, FirstName EM_516040			8/7/19		1.00	100.00					100
		Vacant				8/7/19		1.00	100.00					100
SRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	OCSD LastName, FirstName EM_10014323	P_10008362_1		\$17/19		0.00	-	100.00				100
AUC 1- CIVIN		Employee 2	CCSD LastName, FirstName EM_303745			8/7/19		1.00	,	100.00				100
		Employee 3	CCSD LastName, FirstName EM_553069			8/7/19		1.00		100.00				100
		Employee 4	CCSD LastName. FirstName EM_524230			2/20/20		1.00		100.00				100
	New Position 8	Vecent	Vacant					1.00		100.00				100
RADE 2 - C1020	P_10008383_1 ORADE 2	Employee 1	CCSD LastName, FirstName EM_312411		7	8/7/19		1.00	100.00					100
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954			8/7/19		1.00		100.00				100
	New Position 5	Vecent	Vacant		/			1.00			100.00			100
RL-ELEM. 2ND - C1025	P_10000385_1 ARL-ELEN	2ND Employee 1	CCSD LastName, FirstName EM_10004404	/		8/7/19		1.00	100.00					100
RADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305	/		7/1/20		1.00	105.00					100
		Employee 2	CCSD LastName, FirstName EM_502500	/		8/7/19		1.00	100.00					100
		Employee 3	COSD LastName, FirstName EM_524230			2/20/20		1.00	100.00					100
		Employee 4	CCSD LastName, FirstName EM, 10014323	P_10008382_1		8/7/19		1.00	100.00					100

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

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

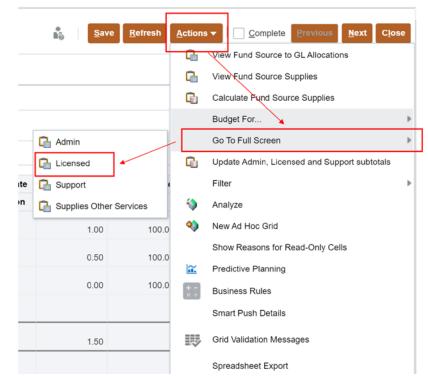
SCHOOL BUDGE		nst										fa Seve	Bofresh &c	Dons +	mplete Durin	Best Cpos
Scenario Version Budget Working_SE	Years Entity FY21 02357	Allen, DeanES												1	Q	Ad box
					Employee Name	Assigned	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percentage		FS Perc	entage	Total Fund Brc
				0	Transfer Position	Number	P Managert									
				G	Calc Total Position Costs	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM1 PM1 - C1000	P_10008381_1 KD	O 1 AM/1 PM	Employee 1	10000				8/7/19		1.00	100.00					100.0
			Employee 2		Mass Calc	1		8/7/19		1.00	100.00					100 (
			Employee 3		Update Funding Source Allocations	•		8/7/19		1.00	100.00					100.0
				G	Edit Position Info			8/7/19		1.00	100.00			-		100.0
GRADE 1 - C1010	P_10008382_1 GR	ADE 1	Employee 1	C.	Go to Licensed Summary	_10008382_1		8/7/19		0.00		100.0	0			100.0
	-			-			_									-

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

	to Detail-Licensed Transf														_	_
Scenario Version Budget Working_SB	Years Entry FY21 0235 Allen, Deanl	s												10	Defa Adhec	Egrma
			Assigned Position Number	Shared Position	Eff Start Date	E# Stop Date	Planned FTE	2	FS Percentage		FS Per	centage	Total Fund Sitc	FS Amou	nt Average Cost I	lasis
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF S8178	Gen GATE	Sp Ed	Allocation Pcl	Gen Fund	CSR	GenF S8
KDG 1 AM/1 PM1 - C1000	P_10006381_1 KDG 1 AM/1 P	I Employee 1			8/7/19		1.00	100.00					100.00	08,205,51		
		Employee 2			6/7/19		1.00	100.00					100.00	88,205.51		
		Employee 3			8/7/19		1.00	100.00					100.00	88,205.51		
		Vacant			\$/7119		1.00	100.00					100.00	08,205.51		_
RADE 1 - C1010 P	P_10008382_1 GRADE 1	Employee 1	P_10008382_1		8/7/19		0.00		100.00				100.00		0.00	
		Employee 2			\$/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		500.00				100.00		88,205.51	
	New Position 8	Vacant					1.00		100.00				100.00		88,205.51	
ORADE 2 - C1020	P_10000383_1 GRADE 2	Employee 1			6/7/19		1.00	100.90					100.00	08,295.51		
	P_10008304_1 GRADE 2	Employee 1			8/7/19		1.00		100.00				100.00		88,205 51	
	New Position 5	Vacant					1.90			100.00			190.00			- C
ARL-ELEM, 2ND - C1025	P_10000385_1 ARL-ELEM, 2N	D Employee 1			8/7/19		1.00	100.00					100.00	88,205.51		
GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1			7/1/20		1.00	100.00					100.00	88.205.51		
		Employee 2			8/7/19		1.00	100.00					100.00	88,205.51		
		Employee 3			2/20/20		1.00	100.00					100.00	88.205.51		
		Employee 4	P 10008382 1		\$17719		1.00	100.00					100.00	88,205 51		

#### Transfer to New Vacant Position

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



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

CHOOL BUDG	ET										0		ň.,	Save Betresh &	Actions +
cenario Years udget FV21	Ently 0280 Damell, Marshall C.ES														
MANAGE PO	SITION/EMPLOYEE	BUDGET by	WORK LO	CATIO	ON										
Aersion Nerking_S8															
Administrative License	Support Addi Earnings Su	oplies and Other Sv	ci SLA												
				-		-									
		Assumption	Shared Position Assumption	Assumption		Eff Stop Date Assumption	Planned FTE Assumption	Gen Fund	CSR	GenF Read by 3	GenF 58178	Gen GATE	rcentage So Er	Total Fund Sec d Allocation Pct	
KDG 1 AM11 PM1 - C100	00 P_10010117_1 KDG 1 AM/1 PM				8/7/19		1.00	100.00						100.00	88
	P_10010117_1 KDG 1 AM1 P				8/7/19		0.00	100.00						100.00	1
	P_50010117_1 KDG 1 AM1 P			8/7/19			1.00	100.00	100.00		0.00			100.00	88
	P_10010117_1 KDG 1 AM****		1		8/7/19		1.00	100.00						100.00	0 85
GRADE 1 - C1010	P_10010118_1 GRADE 1	Calc Total Por	ation Costs		6/7/19		1.00	71.14	28.05					100.00	63
	P_10010118_1 GRADE 1	Mass Calc		*	\$/7/19		1.00		100.00					100.00	,
	P_10010118_1 GRADE 1	Edt Postion	ing Source Allocation		8/7/19		0.00	100.00						100.00	>
		Ge te License	ed Summary		6/7/19		0.00		100 00		_			100.00	,
SUMMARY T	DTALS	Co Ves Fund St	ource to OL Allocatio ource Supplies nd Source Supplies	es	CSR	HOPE2 Mag	net GenF Read b	y 3 GenF \$8178	Title 1 x Z	FS-EDIT For	d Gen 0	LATE SO	Ed a	ZFS-NOEDIT	
	REMAINING BUDGET TO SPI	Budget For		*	C ANe	w Position		98 0.00	0.00	1.01	0.00 (88	205.51)	0.00	(88,295.51)	
ALLOCATED FUNDS: Target BUDGET SPENT:	All Jobs	Delete Position Info Go To Full Screen			C Prep Buyout - Licensed		nsed 89,000	00 100,800.00	0.00 3,43	1,067.41 45	741.83	81	5,835.86	861,578.69	

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

	> SB Add Position				Z								*9	Save Bet	12100		Add Position
eriod egBalance	Years 3	Scenario Version Budget Workin		et, Marshall C.E.S	Job KDG 1 AW1 PM1	I - C1000										-	Calc Total Position Costs Edit Position Info
	Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date										6	View Fund Src to OL Allocations Filter
	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SB178	Magnet	Title i	21st Century	Adut Ed	Adult Correct	Bon	-	Analyze

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

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

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

SB Home	SB Position	Info Detail-Lic	ensed Transf > SB	Add Position									
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0280 Darnell, M	Job arshall C.ES KDC	3 1 AM/1 PM1 - C10	00				1	¢ Dat	a Ad hoc F
	and the state state of the stat		Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			FSF	Percentage	
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB	178 GATI
upport Only-	Enter #Months	and Hours							~				

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

SCHOOL	BUDGE1		^		]				<u>S</u> ave	Refresh Actio	ns 🔻 🗌 <u>C</u> omp	Previous	Next Cl
		G.	Add Position							Fourter			
SB Home >	SB Position In	G	Calc Total Position Costs										
Period BegBalance	Years FY21	G	Edit Position Info		all C.ES KDG	1 AM/1 PM1 - C10	000				/	Data Ad	d hoc F <u>o</u> rn
		G	View Fund Src to GL Allocations		onths Work	Hours Per	Eff Start Date	Eff Stop Date			FS Perc	entage	
			Edit	►	Override	Day Override							
			Adjust	Þ									
		*1	Supporting Detail		.ssumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Support Only-	Enter #Months ε	61	Change History										
		õ	Lock/Unlock Cells										
New Position 5	5		Filter	Þ					50.00		50.00		

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

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

etano Version Opt Werking_56	Nears Exity FY21 6288 Centel, Marshall C.I	65										/	O Deta	Addec Fgmat	
			Employee Name	Shared Position	Etitatbale	ET the Date	Parced FTE		PS Pero	rlage		FS Perc	antage	Total Fund Bri	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Genif Read By 3	Gen# 58175	Ger GATE	50.64	Alecation Pct	
G 1 AM1 PM1 - C1000	P_10010117_1 KDG 1 AM1 PM	Employee 1			87/19		1.00	100.00						10 -	
		Employee 2			87/19		0.00	100.00						10	
		Employee 3			87/19		1.00	100.00			1.00			10	Transfer From Genera
		Employee 4	And the second se		6/7/19		1.00	100 30			1			10	Funded Position 1001
E F	Nev Postor 2	Vecent	Vicet				1.00	50.00			50.00			14	
ADE 1-C1010	P_TOTOTE_TOROLE T	1700,811			2		1.00	71.74	.7.7				_	-	Transfer To 50% Geni
		Employee 2			6/7/19		1.00		100.00					10	50% 58178 funded po
		Employee 3			8/7/19		0.00	100.00							
	P_10010118_1 ORADE 1	Employee 1			8/7/18		0.00		100.00					10	
		Employee 2			8/7/19		5.00		100.00					- 10	
DE 2 - C1020	P_10010130_1 GRADE 2	Employee 1			20119		1.00	100.00						10	
		Employee 2			8/7/19		1.00	100.00						10	
	P_10010121_1 GRADE 2	Employee 1			8/7/19		1.00		100.00					10	
		Employee 2			8/7/19		1.00		100.00					10	

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

	Position Info	DetainLicense	a mansi														
Scenario Vers Budget Worl	rsion Y orking_SB F		Entity 0280 Darnell, Marshall C.ES												/	Data	Ad hoc
						Employee Name	Shared	Eff Start Date	Eff Stop Date	Planned FTE		FS Perce	entage		FS Per	centage	Tota
					G	Transfer Position	POSILION										
					Q		Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Alloca
KDG 1 AM/1 PM1 -	C1000	P_100101	17_1 KDG 1 AM/1 PM	Employee 1		Mass Calc	•	8/7/19		1.00	100.00						
				Employee 2		Update Funding Source Allocations	•	8/7/19		0.00	100.00						
				Employee 3	G	Edit Position Info		8/7/19		1.00	100.00			0.00			
				Employee 4	G	Go to Licensed Summary		8/7/19		1.00	100.00						
		New Position		Vacant	G	View Fund Source to GL Allocations				1.00	50.00			50.00			
BRADE 1 - C1010		P_1001011	18_1 GRADE 1	Employee 1	C	View Fund Source Supplies		8/7/19		1.00	71.14	28.86					
				Employee 2	G			8/7/19		1.00		100.00					
				Employee 3	1			8/7/19		0.00	100.00						
		P_1001011	19_1 GRADE 1	Employee 1		Budget For	<u>+</u>	8/7/19		0.00		100.00					
				Employee 2	G	Delete Position Info		8/7/19		1.00		100.00					
RADE 2 - C1020		P_1001012	20_1 GRADE 2	Employee 1		Go To Full Screen	>	7/31/19		1.00	100.00						
				Employee 2	C.	Edit Position Detail		8/7/19		1.00	100.00						
		P_1001017	21_1 GRADE 2	Employee 1				8/7/19		1.00		100.00					
				Employee 2		Edit	•	8/7/19		1.00		100.00					

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



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

* Select FROM Employee	"Employee 4"	C.	* Select TO Employee	"Employee <mark> 2</mark> "	C <sub>C</sub>
* Select FROM Job Code	"C1000"	°2 <b>—</b>	* Select TO Position	"New Position 2"	C.
* Select FROM Position	"P_10010117_1"		* Select TO JOB	"C1000"	

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

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

Day	sition		
S Error			×
Employee transfer completed [Vacant]. Pleas	e click Refresh, and review and adju	st VACANT FTE as needed and Calcu	late the form.
Е			ок
E: PAIO,AMANDA LEE EM_544838	8/7/19	1.00	100.00

#### 12. Click Refresh:

Contract in the second							0		n) See	Batheah Action	••	plete Disvice	a Beat Close
wars Ently	5										1	O Date	Ad hoc Fgm
		Engloyee Name	Shared Position	Eff Start Date	Eff Step Date	Parnel FTE		ISP	rcentage		FS Per	entage	Total Fund Sec
		Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Genif Read by 3	Gen# S8178	Gen GATE	10 E F	Allocation Pr
P_10010117_1 KDG 1 AM1 PM	Employee 1			6/7/19		1.00	100.00						90
	Employee 2			8/7/19		0.00	100.00						10
	Employee 3			87/19		1.00	100.00			0.00			10
	Employee 4			\$17.79		1.00	100.00						10
New Position 2	Vacant					1.00	50.00			50.00			10
	Detail Luperael Travel Team Ently 1721 EDB Daniel, Marshall C I P_10019117_1 KDG 1 AM1 PM	Detail-Ligensed Transf Teams Ently TY21 EDB Dameit, Marshall C ES P_10010117_1 KDG 1 AM1 PM Employee 1 Employee 3 Employee 3	Entail Contrast Transf           Ners         Enty 5285 Connet, Marshall C.E.S           P_10010117_1 KDD 1 AM11 PM         Employee 1 Employee 3 Employee 4	Distal Contrast Transf Trans Colly TY21 Coll Daniel, Machael C.C.S Employee Name Daniel P_10010117_1 KD0 1 AM11 PM Employee 1 Employee 2 Employee 4	Entail Contrast Training         Entity           Prizzi         Entity           P_10010117_1 KDD 1 AM11PM         Employee 1 Employee 2 Employee 4         Employee 1 Employee 4	EndelConnexe Transf         Endel           Next         Endel           N21         EDB Damert, Mannall C ES           Endel         Paster           P_10010117_1 KDD 1 AM01 PM         Engelsyse Name           Engelsyse Name         Balanding           Assumption         Assumption           P_10010117_1 KDD 1 AM01 PM         Engelsyse 1           Engelsyse 1         67/19           Engelsyse 4         67/19	Entrationerel Trans TY23         Entry EDB Danel, Manhall C ES         Employee Name         Based Paston         Eff that Date         Eff theo Date         Paston Paston         Eff theo Date         Paston Paston         Assumption         Assumption	Colspan="2">Colspan="2"Colspan=""2"Colspan=""2"Colspan=""2"	Order Colspan=It Ansats Colspan	Name         Deared File         File           Colspan=6         Manual C CS           Colspan=6         Manual C CS           Colspan=6         Manual C CS         Passion         CSIS Damed, Manual C CS         FS Frecentage           Colspan=6         Manual C CS         Passion         Assumption         Assumption	Constructioned hand         Constructione hand </td <td>End Subscription Stand         End Subscription Stand         End Subscription Stand         End Subscription Stand         Eff Stand Date         Eff Stand Date         Eff Stand Date         Eff Stand Date         Fit Sta</td> <td>Constructioned Transf         Constructioned Trans         Constructioned Trans         &lt;</td>	End Subscription Stand         End Subscription Stand         End Subscription Stand         End Subscription Stand         Eff Stand Date         Eff Stand Date         Eff Stand Date         Eff Stand Date         Fit Sta	Constructioned Transf         Constructioned Trans         Constructioned Trans         <

#### The transferred employee rows will be displayed in yellow:

SCHOOL BUDGET	r							0	4	Save	Selesh Act	005 - 1 C 2010	inte Dranous	Bost Care
58 Home - 58 Position Inf	to Detail Coensed Transf													
Scenario Version Budget Working_58	Years Entry Pr21 0200 Daniel, Marshall C I	is .										1	O Deta	alloc Fprm
			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Parned FTE		FS P	ecentage		FS Pe	centage
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	Genf SE178	Gen GATE	Sp Ed
KDG 1 AM 1 PM1 - C1000	P_10010117_1 KD0 1 AM1 PM	Employee 1			1	87/19		1.00	100.00					
		Employee 2				87/19		0.00	100.00					
		Employee 3				87/19		1.00	100.00			0.00		
		Employee 4		P_10010117_1		87/19		0.00	100.00					
	New Position 2	Employee 2		P_10010117_5		87.19		1.00	53.00			50.00		

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

SB Home > SB Position Inf									0	8 <sub>0</sub>	<u>S</u> ave	Refresh Actio	ns <b>▼</b>   _ <u>C</u>
Scenario Version Budget Working_SB	Years Entity FY21 0200 Dameil, Marshall C I	s											1
			Q	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Pe	rcentage	
			0	Calc Total Position Costs	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read	GenF SB178
DG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1	_	Mass Calc	•		8/7/19		1.00	100.00			
		Employee 2		Update Funding Source Allocations	•		8/7/19		0.00	100.00			
		Employee 3	G	Edit Position Info			8/7/19		1.00	100.00			0
		Employee 4	G	Go to Licensed Summary	_10010117_1		8/7/19		0.00	100.00			
	New Position 2	Employee 2	0	View Fund Source to GL Allocations	_10010117_1		8/7/19		1.00	50.00			50

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:

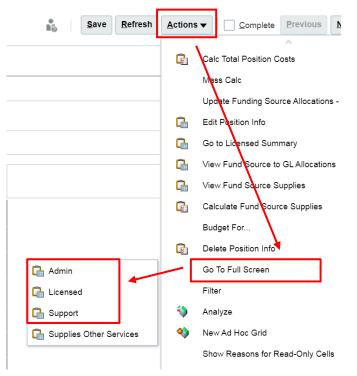
SCHOOL BUDGET	r								0	ň.,	Save	Befresh Actio	005 ¥	Comple
SB Home > SB Position Int	to Detail-Licens	ed Transf												
	Years FY21	Ently 0200 Damel, Marshall C ES											/	1 1
				Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Per	centage		
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Oen Fund	CSR	GenF Read by 3	OenF SE S	78
KDG 1 AMI1 PM1 - C1000	P_100101	7_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 Positi	on 2	Employee 2		P_10010117_1		8/7/19		1.00	50.00				50.00

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

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



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



\* Click <u>here</u> to return to the Table of Contents.

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:

									Contraction of Contra			and the state of the state of the
S8 Home	> SB Position Info	Detail-Licensed T	ranst	Q	Transfer Position							
Scenario Budget		rears En FY21 04	sty 11 Hoggard, Ma	G	Calc Total Position Costs					1	O Data	Ad hoc Format
					Mass Calo Update Funding Source Allocations	,	mployee Name	Assigned Position Number	Shared Position	Eff Start Date	 Eff Stop Date	Planned FTE
				G.	Edit Position Info							
				G	Go to Licensed Summary		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
MUSIC, ELE	M - C1250	P_10014572_1	MUSIC, ELEI	0	View Fund Source to GL Allocations					8/7/19		v*
PHYSICAL E	D - C1260	P_10014573_	PHYSICAL E	G	View Fund Source Supplies					8/7/19		0
ECSE AUTIS	M-KIDS - C6031	P_10014574_1	ECSE AUTIS	G	Calculate Fund Source Supplies					9/9/19		10
GEN RR ELE	EM - C6050	P_10014575_	GEN RR ELE		Budget For					8/7/19		5
GATE ELEM	- C6130	P_10014576_	GATE ELEM	C)	Delete Position Info					8/7/19		10
COUNSELO	R/ELE - C8000	P_10014577_	COUNSELOF	-	Go To Full Screen					8/7/19		10
LIBRARY EL	E - C8040	P_10014578_1	LIBRARY EL	1215		1				8/7/19		0
LEARN STR	AT, ELEM - C8111	P_10014579_	LEARN STR	G	View Edit Position Totals					8/7/19		10
					Edit					8/7/19		
					Adjust	,				8/7/19		0
				-1	Supporting Detail			P_10014581_1		8/7/19		
RBG3 LEAR	NING STR - C8112	P_10014580_1	RBG3 LEAR	-	v					8/7/19		10
LRN STRT T	TL1 ELE - C8114	P_10014581_	LRN STRT TTL	.1 ELE	Employee 1			P_10014581_1		8/7/19		0.
Licensed Job	16	Total All Positio	ms		Total All Employees					1		31.

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

SB Mome > SE	B Positi	on Info Detail-Licer	ised transf > SB	Edit Position Detail									
	ears Y21	Entity 0411 Hogga	rd, MabelES (Mag	Job net) (Pr LRN STRT TT	L1 ELE - C8114						$\rightarrow$	1	¢
Position	n Infe	ormation D	etail										
Position P_10014581_1 L	RN ST	RT TTL1 ELE Em	ployee ployee 1								$\rightarrow$	1	0
	rte	Months Work Ov	Hours Per Day	Planned FTE Cal	culated Actual Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total Er	mployee
	'n	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Sala	Average Base Sa	Assumption	Assumption	Assumption	Assu	mption
Strategic Budge		09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary	P_10014581_1	No		0.0
		< (1945)										-	
-													
Comper	nsati	on Monthl	y Spread I	Detail									
Version P	osition	Employee 581_1 Employee		Detail							+	1	¢
Version P	osition	Employee		Detail	YearTotai	Jul	Aug	Sep	Oct	Nov	⇒ Dec	/	© Jan
Version P Working_SB P	osition _10014	Employee 581_1 Employee	1	Detail	YearTotal 0.0					Nov 00 0.00	Dec	10	
Version P Working_SB P Basic Salary Exp	osition _10014 pense-/	Employee 581_1 Employee Actual Basis	1 As:		0.0	0.0	0.0	0.0	0 0.		Dec 0.0		
Version P Working_SB P Basic Salary Exp	osition _10014 pense-/	Employee 581_1 Employee Actual Basis	1 Ass Put	umption	0.0 rstem 0.0	0.0 0.0 0.0 0	0.0 0.0 0.0 0.0	00 0.0	o o. o o.	00 0.00	Dec 0.0	10	
Version P Working_SB P Basic Salary Exp	osition _10014 pense-/	Employee 581_1 Employee Actual Basis	1 Ass Put Occ	umption Jlic Emp Retirement Sy	0.0 rstem 0.0	0 0.0 0 0.0 0 0.0	0.0 00 0.0 0 0.0 0	00 0.0 00 0.0 00 0.0	0 0 0 0 0 0	00 0.00	Dec 0 0.0 0 0.0	10	
Version P Working_SB P Basic Salary Exp	osition _10014 pense-/	Employee 581_1 Employee Actual Basis	1 Ass Put Occ Sta	umption slic Emp Retirement Sy supational injury Mana	0.0 rstem 0.0 gement 0.0	0 0.0 0 0.0 0 0.0 0 0.0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	00 0.0 00 0.0 00 0.0 00 0.0	0 0 0 0 0 0 0 0	00 0.00	Dec 0.0	10 10 10	
Version P Working_SB P Basic Salary Exp Benefits Expens	osition _10014 pense-J	Employee 581_1 Employee Actual Basis	1 Aste Put Occ Sta Met	umption Jic Emp Retirement Sy supational Injury Mana te Unemployment Ins	0.0           rstem         0.0           gement         0.0           0.0         0.0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0 0.0 0 0.0 0 0.0 0 0.0 00 0.0	0 0 0 0 0 0 0 0 0 0 0 0	00 0.00 00 0.00 00 0.00 00 0.00	Dec 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0	10 10 10	
Version P Working_SB P Basic Salary Exp Benefits Expens	osition _10014 pense-J ie-Actu	Employee 581_1 Employee Actual Basis al Basis	1 Ass Put Occ Sta Mer	umption Lic Emp Retirement Sy upational injury Mana te Unemployment Ins Jicare	0.0           rstem         0.0           gement         0.0           0.0         0.0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0	0 0 0 0 0 0 0 0 0 0 0 0	00 0.00 00 0.00 00 0.00 00 0.00 00 0.00	Dec           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0		
Version P Working_SB P Basic Salary Exp Benefits Expens	osition _10014 pense-J ie-Actu ISATIO pense-J	Employee 581_1 Employee Actual Basis al Basis N EXPENSE-ACTI	1 Ass Put Sta JAL BASIS TO Ass	umption IIC Emp Retirement Sy upptional injury Mana te Unemployment Ins dicare TAL SALARY & FRINGS	0.0           rstem         0.0           gement         0.0           0.0         0.0           E BENEFITS         0.0           0.0         0.0	0,0 0 0,0 0 0,0 0 0,0 0 0,0 0 0,0 0 0,0 0 0,0 0 0,0 0 0,0 0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0 0.0 0 0.0 0.	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	00 0.00 00 0.00 00 0.00 00 0.00 00 0.00	Dec           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0		
Version P Working_SB P Basic Salary Exp Benefits Expens TOTAL COMPEN Basic Salary Exp	osition _10014 pense-J ie-Actu ISATIO pense-J	Employee 581_1 Employee Actual Basis al Basis N EXPENSE-ACTI	1 Ass Put Sta JAL BASIS TO Ass Put	umption blic Emp Retirement Sy upational injury Mana te Unemployment Ins dicare IAL SALARY & FRINGE sumption	0.0           rstem         0.0           gement         0.0           0.0         0.0           0.0         0.0           0.0         0.0           rstem         0.0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0 0 0.0 0 0 0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0 0 0.0 0 0 0	00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	00 0.00 00 0.00 00 0.00 00 0.00 00 0.00 00 0.00	Dec           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0	10 10 10 10 10 10	
Version P Working_SB P Basic Salary Exp Benefits Expens	osition _10014 pense-J ie-Actu ISATIO pense-J	Employee 581_1 Employee Actual Basis al Basis N EXPENSE-ACTI	Ass Put Occ JAL BASIS TO Ass Put Occ	sumption olic Emp Retirement Sy supational injury Mana te Unemployment Ins dicare trAL SALARY & FRING sumption blic Emp Retirement Sy	0.0           rstem         0.0           gement         0.0           0.0         0.0           0.0         0.0           0.0         0.0           rstem         0.0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0	00 0.0 00 00 0.0 00 00 0.0 00 00 0.0 00 00 0.0 00 00 0.0 00	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	00 0.00 00 0.00 00 0.00 00 0.00 00 0.00 00 0.00 00 0.00	Dec           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0           0         0.0		

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

		osition Info Detail-Li													
Scenario Budget	Years FY21	Entity		J	ob RN STRT TTL1 ELE	E - C8114							$\rightarrow$	1	¢
⊿ Positi	on I	nformation	Detail												
Position P_10014581_	1 LRN	STRT TTL1 ELE	Employee Employee 1										<i>⇒</i>	/	¢
	rt	e Months Work	Ov Hours Per D	ay O Planned	d FTE Calculate	d Actual Base Salary	Calculated Avera	Total Comp Ex	p Total Comp Exp	Job Indicator	Assigned	d Positic	Multi Job	Total E	mploye
	я	n Assumption	Assumptio	n Assum	ption B	udget Spent	Budget Spent	Actual Base Sa	ala Average Base Sa	Assumption	Assum	ption	Assumption	Assu	mption
Strategic Bud	dget	09 Months		.00	0.00	0.00	0.00				P_10014		No		0.
	_							Q	Edit Position Info						
								Q	Calculate Total C	ompensation Exp	0				
✓ Comp	ens	ation Mont	hly Sprea	d Detail				C C	View Fund Source	e to GL Allocation					
Version Working_SB	Posit	tion Employ							then i and obard	e to GE Milocation					
	P_10	0014581_1 Employ						Q			5		$\rightarrow$	/	\$
	P_10					YearTotal	Jul		Update Position	fotals		Nov	⇒ Dec	/	¦Ĉ Jan
Basic Salary			vee 1	Assumption		YearTotal 0.0		Q	Update Position ' Edit New Position	lotals n Detail	,	Nov 0.00	Dec		
Basic Salary Benefits Expe	Expen	0014581_1 Employ	vee 1		etirement System		0.0		Update Position	lotals n Detail	,		Dec		
	Expen	0014581_1 Employ	vee 1	Public Emp Re	etirement System Injury Managemen	0.0	00 0.0		Update Position Edit New Position Calc Alloc to GL Add Position	lotals h Detail String-All Position	,	0.00	Dec 0.0	00	
	Expen	0014581_1 Employ	vee 1	Public Emp Re	injury Managemen	0.0	00 0.0 00 0.0 00 0.0		Update Position Edit New Position Calc Alloc to GL Add Position Calc Total Positio	lotals h Detail String-All Position	,	0.00	Dec 0.0	00	
	Expen	0014581_1 Employ	vee 1	Public Emp Re Occupational I	injury Managemen	0.0 0.0	00 0.0 00 0.0 00 0.0 00 0.0		Update Position Edit New Position Calc Alloc to GL : Add Position Calc Total Position Edit Position Info	Totals n Detail String-All Position n Costs	,	0.00 0.00 0.00	Dec 0.0	00	
Benefits Exp	Expen ense-A	0014581_1 Employ	vee 1	Public Emp Re Occupational I State Unemplo Medicare	injury Managemen	t 0.0	00 0.0 00 0.0 00 0.0 00 0.0 00 0.0		Update Position Edit New Position Calc Alloc to GL : Add Position Calc Total Position Edit Position Info	Totals n Detail String-All Position n Costs	,	0.00 0.00 0.00 0.00	Dec 0.0		Jan
Benefits Expe	Expen ense-A	0014581_1 Employ ase-Actual Basis Actual Basis	vee 1	Public Emp Re Occupational I State Unemplo Medicare	injury Managemen byment ins	t 0.0	00 0.0 00 0.0 00 0.0 00 0.0 00 0.0		Update Position Edit New Position Calc Alloc to GL : Add Position Calc Total Position Edit Position Info	Totals n Detail String-All Position n Costs	,	0.00 0.00 0.00 0.00 0.00	Dec 0.0		
Benefits Expe	Expen ense-A PENSA	0014581_1 Employ ase-Actual Basis Actual Basis	CTUAL BASIS	Public Emp Re Occupational I State Unemplo Medicare	injury Managemen byment ins	t 0.0	00 0.0 0.0 00 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0		Update Position Edit New Position Calc Alloc to GL : Add Position Calc Total Positio Edit Position Info View Fund Src to	Totals n Detail String-All Position n Costs	8	0.00 0.00 0.00 0.00 0.00	Dec 0.0 0.0 0.0 0.0 0.0		
Benefits Expe TOTAL COMP Basic Salary	Expen ense-A PENSA Expen	NO14581_1 Employ Inse-Actual Basis Actual Basis Actual Basis	CTUAL BASIS	Public Emp Re Occupational I State Unemplo Medicare TOTAL SALAR Assumption	injury Managemen byment ins	t 0.1 t 0.1 FITS 0.1	000 0.0 000 0.0 000 0.0 000 0.0 000 0.0 000 0.0 000 0.0 000 0.0 000 0.0		Update Position 1 Edit New Position Calc Alloc to GL : Add Position Calc Total Positio Edit Position Info View Fund Src to Edit Adjust	Totals n Detail String-All Position n Costs	8	0.00 0.00 0.00 0.00 0.00 0.00	Dec 0.0 0.0 0.0 0.0 0.0		
Benefits Expe TOTAL COMP Basic Salary	Expen ense-A PENSA Expen	NO14581_1 Employ se-Actual Basis Actual Basis Actual Basis Actual Basis Actual Basis	CTUAL BASIS	Public Emp Re Occupational I State Unemplo Medicare TOTAL SALAR Assumption Public Emp Re	injury Managemen oyment ins RY & FRINGE BENE	EFITS 0.0	0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00		Update Position 1 Edit New Position Calc Alloc to GL : Add Position Calc Total Positic Edit Position Info View Fund Sec to Edit Adjust Comments	Totals n Detail String-All Position n Costs GL Allocations	8	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	Dec 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0		
Benefits Expe TOTAL COMP Basic Salary	Expen ense-A PENSA Expen	NO14581_1 Employ se-Actual Basis Actual Basis Actual Basis Actual Basis Actual Basis	CTUAL BASIS	Public Emp Re Occupational I State Unemplo Medicare TOTAL SALAR Assumption Public Emp Re	Injury Managemen oyment Ins RY & FRINGE BENE etirement System Injury Managemen	EFITS 0.0	0.0 00 00 0.0 00 00 0.0 00 00 0.0 00 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00 0.0 00		Update Position 1 Edit New Position Calc Alloc to GL : Add Position Calc Total Position Calc Total Position Calc Total Position Unew Fund Sec to Edit Adjust Comments Supporting Detail	Totals n Detail String-All Position n Costs GL Allocations	8	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	Dec 0.0		

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

SB Home > S	SB Posit	tion Info Detail-Lice	nsed Transf > S	B Edit Pos	ition Detail										
Scenario Y	Years FY21	Entity	ard, MabelES (M		Job	T TTL1 EL	E - C8114						+	/	¢
Positio	n Inf	ormation <b>E</b>	Detail												
Position P_10014581_1	LRN ST	RT TTL1 ELE	nployee nployee 1										+	/	¢
	ıte	Months Work Ov	Hours Per Da	O Plan	od FTE	Calculate	ed Actual Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total E	mploye
	'n	Assumption	Assumption	Ass	mption	E	Budget Spent	Budget Spent	Actual Base Sala	Average Base Sa	Assumption	Assumption	Assumption	Assu	mptior
								1							
Strategic Budg	jet	09 Months	0.	0	0.00		0.00	0.00	0.00	0.00	Primary		No		0
	ensat	ion Month	ly Spread				0.00	0.00	0.00	0.00	Primary		No		0.
Compe Version	ensat Position		ly Spread				0.00	0.00	0.00	0.00	Primary		¥0 ➡	/	0.1
Compe Version	ensat Position	ion Month	ly Spread				0.00	Jul	0.00	0.00 Sep	Primary Oct	Nov	No → Dec	/	
Compe Version Working_SB	Position P_10014	tion Month	ly Spread				YearTotal		Aug	Sep	Oct		Dec	10	0
Compe Version Working_SB Basic Salary Ex	Position P_10014	tion Month	ly Spread	Detai		nt System	YearTotal 0	Jul	Aug 00 0.0	Sep 10 0.0	Oct 0.0	00.00	<b>Dec</b> 0.0		0
Compe Version Working_SB Basic Salary Ex	Position P_10014	tion Month	ly Spread	Detai	n Retiremen	nt System lanagemen	YearTotal 0 0	Jul 0.0	Aug 00 0.0	Sep 00 0.0 00 0.0	Oct 0.0	0.00	Dec 0.0	0	0
Compe Version	Position P_10014	tion Month	ly Spread	Detai ssumption ublic Emp ccupation	n Retiremen	lanagemen	YearTotal 0 0 nt 0	Jul 100 00	Aug 00 0.0 00 0.0	Sep 00 0.0 00 0.0 00 0.0	Oct 0.0	00 0.00 00 0.00 00 0.00	Dec 0.0	10	0
Compe Version Working_SB Basic Salary Ex	Position P_10014	tion Month	ly Spread	Detai ssumption ublic Emp ccupation	n Retiremer	lanagemen	YearTotal 0 nt 0 0	1 Iul 0 000 000 000 000 000 000 000 000 000	Aug 00 0.0 00 0.0 00 0.0 00 0.0	Sep 00 0.0 00 0.0 00 0.0 00 0.0	Oct 0.0	00 0.00 00 0.00 00 0.00 00 0.00	Dec 0.0 0.0 0.0 0.0	10 10	<

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

Scenario Version	fo Detail-Lice Years	Entity								1
	FY21	0411 Hoggard, MaberES (Ma	gnet) (Pr				/	O Data	Ad hoc Format	
				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_1001	14572_1 MUSIC, ELEM	Employee 1				8/7/19		υ*	
PHYSICAL ED - C1260	P_1001	14573_1 PHYSICAL ED	Employee 1				8/7/19		0	
CSE AUTISM-KIDS - C603	P_1001	14574_1 ECSE AUTISM-KIDS	Employee 1				9/9/19		0	
SEN RR ELEM - C6050	P_1001	14575_1 GEN RR ELEM	Employee 1				8/7/19		-0	
DATE ELEM - C6130	P_1001	14576_1 GATE ELEM	Employee 1				8/7/19		10	
COUNSELOR/ELE - C8000	P_1001	14577_1 COUNSELOR/ELE	Employee 1				8/7/19		1.1	
UBRARY ELE - C8040	P_1001	14578_1 LIBRARY ELE	Employee 1				8/7/19		1.4	
EARN STRAT, ELEM - C811	1 P_1001	14579_1 LEARN STRAT, ELEM	Employee 1				8/7/19		- 0	
			Employee 2				8/7/19		1.	
			Employee 3		-	-	8/7/19		U.	
			Employee 4		P_10014581_1		8/7/19		1.	
RBG3 LEARNING STR - C81	12 P_1001	14580_1 RBG3 LEARNING STR	Employee 1		_	-	8/7/19		0	
RN STRT TTL1 ELE - C811-	P_1001	14581_1 LRN STRT TTL1 ELE	Employee 1				8/7/19		.0.	<b>Original Posi</b>
Licensed Jobs	Total Al	I Positions	Total All Employees						31.	Number Tran From

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

CHOO	L BUDGET					A		Save	Befresh A	ctions w	De-	mplete Previou	Next Clo
					Q	Transfer Position		Base	Dencau	cuoins v		Sides Diseason	Ber Ck
SB Home	e > S8 Position Inf	o Detail-Lice	ensed Transf		Q	Calc Total Position Costs							
Scenario Budget		Years FY21	Entity 0411 Hoggard, MabelES (Ma	gnet) (Pr		Mass Calc	*				/	© 044	Ad hoc Fer
					9	Update Funding Source Allocations Edit Position Info Go to Licensed Summary		signed osition umber	Shared Position	Eff Start	Date	Eff Stop Date	Planned FTE
					G	View Fund Source to GL Allocations		umption	Assumption	Assump	tion	Assumption	Assumption
ART, ELEM	- C1100	P_1001	14571_1 ART, ELEM	Employee 1	C.	View Fund Source Supplies				8/7/19			1.
MUSIC, ELE	M - C1250	P_1001	14572_1 MUSIC. ELEM	Employee 1	Q	Calculate Fund Source Supplies				8/7/19			1
PHYSICAL F		Employee 1		Budget For				8/7/19			1		
ECSE AUTIS	SM-KIDS - C6031	P_1001	14574_1 ECSE AUTISM-KIDS	Employee 1	Q	Delete Position Info				9/9/19			1
GEN RR ELI	EM - C6050	P_1001	14575_1 GEN RR ELEM	Employee 1	- 40					8/7/19			1
GATE ELEM	I - C6130	P_1001	14576_1 GATE ELEM	Employee 1		Go To Full Screen				8/7/19			1
COUNSELO	R/ELE - C8000	P_1001	14577_1 COUNSELOR/ELE	Employee 1		Edit	•			8/7/19			1
LIBRARY EL	LE - C8040	P_1001	14578_1 LIBRARY ELE	Employee 1		Adjust				8/7/19			3
LEARN STR	AT, ELEM - C8111	P_1001	14579_1 LEARN STRAT, ELEM	Employee 1	1.1	Supporting Detail				8/7/19			1
				Employee 2		Change History			1	8/7/19			1
				Employee 3		v v				8/7/19			1
				Employee 4			P_10	014581_1		8/7/19			1
RB03 LEAR	INING STR - C811	2 P_1001	14580_1 RBG3 LEARNING STR	Employee 1				3	2	8/7/19			1
LRN STRT 7	TTL1 ELE - C8114	P_1001	14581_1 LRN STRT TTL1 ELE	Employee 1						8/7/19			0
Licensed Jot	bs	Total Al	I Positions	Total All Employees			1				_		31
				and the second se			-						

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

Laun	ch Con	firmatio	on Messa	age			×
Are yo	ou sure yo	ou want t	to delete?				
					ок	Cancel	

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

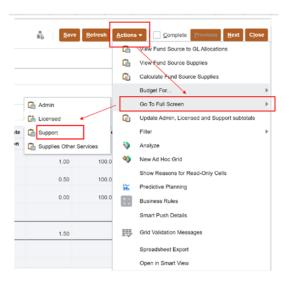
Delete Position Info					<u>L</u> aunch	<u>C</u> ancel
* Select FROM Employee	"Employee 4"	ç,	* Select FROM Job Code	"C8111"		₹ <sub>0</sub>
* Select FROM Position	"P_10014579_1"	7-C				
F						

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

084DE 5 - C1050 P	P_10014570_1 GRADE 5	Employee 2 Employee 3 Employee 1	Employee Name Assumption	Shared Position Assumption	Ef Start Date	Eff Stop Date	Parvet FTE Assumption	Gen Fund
DRADE 5-C1050 P	P_10014570_1 GRADE 5	Employee 3	Assumption	Assumption		Assumption	Assumption	Gen Fund
0RADE 5 - C1080 P,	P_10014570_1 GRADE 5	Employee 3			87.19			
DRADE 5 - C1050 P	P_10014570_1 GRADE 5						1.00	. 10
0/4ADE 5 - C1050 P	P_10014570_1 GRADE 5	Employee 1			8719		1.00	100-
					87/19		1.00	100
		Employee 2			7/01/19		1.00	1001
		Employee 3			8719		1.00	100/
ART, ELEM - C1100 P,	P_10014571_1 ART, ELEM	Employee 1			8719		1.00	100-
MUSIC, ELEM - C1250 P,	P_10014572_1 MUSIC, ELEM	Employee 1			87/19		1.00	100/
PHYSICAL ED - C1260 P	P_10014573_1 PHYSICAL ED	Employee 1			87/19		1.00	100-
ECSE AUTISM-KIDS - C6031 P	P_10014574_1 ECSE AUTISM KIDS	Employee 1			9.9.19		1.00	
DEN RR ELEM - C6050 P,	P_10014575_1 GEN RR ELEM	Employee 1			8/7/19		1.00	
DATE ELEM - C6130 P,	P_10014576_1 GATE ELEM	Employee 1			8/7/19		1.00	
COUNSELORIELE - CROOD P	P_10014577_1 COUNSELORIELE	Employee 1			8/7/19		1.00	100-1
UBRARY ELE - C8040 P,	P_10014578_1 LIBRARY ELE	Employee 1			8/7/19		1.00	100
LEARN STRAT, ELEM - CRITI P,	P_10014579_1 LEARN STRAT, ELEM	Employee 1			8/7/19		1.00	100.4
		Employee 2			87719		1.00	100.4
		Employee 3			8/7/19		1.00	100.1
BOD LEARNING STR - CE112 P.	P_10014580_1 RBG3 LEARNING STR	Employee 1			87/19		1.00	
AN STRT TTL1 ELE - C8114 P.	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			8/7/19		0.00	7/

#### Budgeting for a Shared Position

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



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

BB Home - SS Poydon II Scenario Vorcas Budget Warking SB	to Detail (Joonsen Transf - 58 Position Into De Years Eroty PY21 0235 Alex DeartES	nai-Buaport Transf										10		Torme
ando mund <sup>*</sup> ac			Employee Name	Enand. Petition	Months Work Override	Hourb Per Day Overnide	Etf brait Date	E# Blue Date	F0 Percentage	FS Per	centage	Total Fund She	FS Amount Average Cost Basis	Ft Anou
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fland	Foot	Rp Ed	Allocation Pol	Oett Fund	Foot
	P_20003017_1 COMPUTER TECH1	Employee 1	CCSD Lashiane, Festbane DM_10058875	SP-Ym	Entries		×		966.00			\$00.00	54,385.45	
CUSTODIAN - N8040	F_10005637_1 CUSTODIAN	Employee 1	CCSD Laziname, Festivame EM_10200441		Search				100.00			500.00	40,355.17	
	P_10006413_1 CUSTODIAN	Employee 1	COSD LastNama, FirstNama EM_10200761						00 000			100.00	45,833.82	
HD CUST I - NETTO -	P_10008414_1 HD CUST1	Employee 1	COBD LastName, FirstName EM_317215		Name				100.00			100.00	03,512,33	
SCHOOL AIDE - NO100	P_1000E401_1 SCHOOLAIDE	Employee 1	COLD Lachiane, Fristlane EM, 10041303		SP-Yes		_		100.02			100.00	23,009,38	
LIERARY AIDE - N0105	P_10008402_1 LIBRARY AIDE	Entployee 1	COSD Lauthame, FirstName EM_10028399		SP-No.				200.00			100.00	0.046.23	
	in somewhy summary arts	Dereman 1	CONTRACTOR SHARE SHARE THE POSTERNA		OP-NO				100 001			500 111	71.007.81	

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

574738239 2010	BUDGE		nced Transf > 58 Position Into D	and Summed Transf							<b>N</b> D	Seve B	(effection	ns - I Complete	2111111	ext Clos
Scenario Budget	Werston Working_58	Years	Ently 0235 Allen, DeanES							/				/ 0	Data Ad b	e Forma
					Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	F8 Percentage	FS Pe	centage	Total Fund Src	FS Amount Average Cost Basis	FS Amour
					Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
		P_200	03817_1 COMPUTER TECH I	Employee 1	CCSD LastName, FirstName EM_10058970	SP-Yes	10 Months	4.00	7/1/20		100.00			100.00	20,163.65	
CUSTODIAN	- N8040	P_100	05637_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_10200441		12 Months	8.00	4/6/20		100.00			100.00	40,355.17	
		P_100	06413_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_10200761		12 Months	7.00	7/1/20		100.00			100.00	45,833,62	
HD CUST I - I	N8.110	P 100	08414_1 HD CUST I	Employee 1	CCSD LastName, FirstName EM_317295		12 Months	8.00	12/22/19		100.00			100.00	63.512.33	

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

Scenario Version Budget Working_S8	Years Entity FY21 0235 Allen, DeanEl	s											1	O Rese	Art boc Format
	ſ	<b>D</b> 1	Emplo Calc Total Position Costs	yee Name	Shared Position	Months Work Override	Hours Per Day Overnde	Eff Start Date	Eff Stop Date	F8 Percentage	FS Perce	intage	Total Fund Src	FS Amount Average Cost Basis	FS Amount Act
	L	-	Mass Calc	pton	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Atocation Pct	Gen Fund	Food
	P_20001817_1 COMPUTER		Update Funding Source Allocations	Iame EM_10058970	SP-Yes	10 Months	4.00	7/1/20		100.00			100.00	20,163.65	-
CUSTODIAN - N8040	P_10005637_1 CUSTODIAN P_10008413_1 CUSTODIAN	0	Edit Position Info	Jame EM_10200441		12 Months 12 Months		4/8/20 7/1/20		100.00			100.00	40,355,17 45,833,62	
HD CUST I - NE110	P_10008414_1 HD CUST I	0	Go to Licensed Summary	ame EM_317295		12 Months	8.00	12/22/19		100.00			100.00	63,512,33	
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AB	0	View Fund Source to GL Allocations	ame EM_10041392		10 Months	8.90	3/11/20		100.00			100.00	33,005 38	
LIBRARY AIDE - N0105	P_10008402_1 LIBRARY AI	0	View Fund Source Supplies	ame EM_10028385		09 Months	2.50	12/22/19		100.00			100.00	8.846.28	
	P_10008403_1 LIBRARY AL	Q.	Calculate Fund Source Supplies	Arme EM_10028366		09 Months	4.10	12/22/19		100.00			100.00	21,992.43	
CLERK TYPIST I - N0110	P_10008400_1 FRST AID/S	~	Budget For	kame EM_542377		09 Months	2.00	12/22/19		100.00			100.00		
SPTA 8 - N0162	P_10008406_1 SPTA1	0.	Bulget Por	kame EM_10049345		09 Months	0.00	1/19/20				100.00	100.00		

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

# Budgeting for a Prep Buy Out

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

 Licensed.

Scenario Budget		Entity 235 Allen, DeanES							G G	View Fund Source to GL Allocations View Fund Source Supplies	
MAN	AGE POSIT	ION/EMPLOYEE BUDG	ET by WO	RK LOCATI	ON					Calculate Fund Source Supplies	
Version Vorking SB							🕒 Prep Buyout - Li	censed		Budget For	- 1
dministra		Support Add'l Earnings Supplies ar	nd Other Svcs SL	A			强 Add-On and Ext	ra - Licensed		Go To Full Screen	)
		oupport more comingo coppino a					强 Add-On and Ext	ra - Support	G	Update Admin, Licensed and Support subtotals	
			Employee Name	Shared Position	Eff Start Date	Eff Stop Da	te Planned FTE	FS Percentag		Filter	1
			Assumption	Assumption	Assumption	Assumptio	n Assumption	Gen Fund	- 🎨	Analyze	
ELE PRIN	IC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.0	0 100.0	-	New Ad Hoc Grid	
										Show Reasons for Read-Only Cells	
									iii.	Predictive Planning	
Admin Jo	bs	Total All Positions					1.0	0	+ - × +	Business Rules	
										Smart Push Details	
									IJ	Grid Validation Messages	
										Spreadsheet Export	
										Open in Smart View	

2. You will be brought to the **SB PrepBuy-Mult** form. From the list of positions available, scroll until you find the desired position, then right-click on the **position number** and select **Edit Prep Buy Details**.

	LBUDGET			9	Edit Prep Buy Details			<b>S</b> a <b>S</b> a	efresh	Actions 👻		Complete Provid	oun <u>N</u> ext C	lose
SB Home	> SB PrepBuy-Mu	<i>2</i> 7		0	View Prep Buy and Fringe									_
Scenario Budget		/ersion Norking_SB	Entity 0235 Allen, DeanES	0	View Prep Buy GL Code String						/	O Data	Ad hoc Fo	ermat
					Edit Adjust	*	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note		FS Amount Prep Buy	FS Percentage- Prep Buy	Pi
					Supporting Detail Change History Lock/Unlock Cells			Assumption		Assumptio	n	Gen Fund	Gen Fund	
					Filter	,	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecifie Cost Cente		Unspecified Cost Center	Unspecified Cost Center	U C
Enter # of Pro	ep Buys and Prep I	Days:			Sort	*				1				-
				1	Analyze		1							
KDG 1 AM/1	PM1 - C1000	P_10	0008381_1 KDG 1 AM/1 PM	-	New Ad Hoc Grid									
		P_10	0008381_1 KDG 1 AM/1 PM		Show Reasons for Read-Only Cells									
		P_10	008381_1 KDG 1 AM/1 PM	942	neromana da C									
		P_10	0008381_1 KDG 1 AM/1 PM	1	Predictive Planning		1							
GRADE 1 - C	01010	P_10	0008382_1 GRADE 1		Business Rules									
		P_10	0008382_1 GRADE 1		Smart Push Details									
		P_10	0008382_1 GRADE 1		~		-							
		P 10	0008382_1 GRADE 1	C	CSD LastName, FirstName EM 524230	ŝ.				-				

3. You will be brought to the SB PrepBuy form. Enter 1 in the Number of Preps column next to the employee name. Enter the appropriate number of days in the Prep Buy Days column. *If your school is on a block schedule*, select Yes in the dropdown under Block Schedule. If not, you may select No, or leave the cell blank. If desired, enter a comment in the Prep Buy Note column (such as a justification for the Prep Buy). Because a Prep Buy cannot be split-funded, you must enter 100 under the desired funding source (for example, the Gen Fund). You will receive an error if you try to split-fund the Prep Buy. Click Save when finished (this will calculate the prep buy costs and will automatically update the Summary Totals and the Additional Earnings tab on the School Budget form).

SB Home	> SB PrepBuy-	Mult > S8 Prep8	luy					1				
Scenario Budget	Years FY21	Entity 0235 Allen, De		Job KDG 1 AM/1 PM1 -	C1000 Employee 1	Position P_10008381_1	KDG 1 AM/1 PM			0	Data Ad hoc	Format
			nployee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense- Actual Basis			FS Percen	itage-Prep
		Ass	umption	Assumption	Assumption	Assumption	Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	CSR	Title I	21st
Inter # of Pre	ep Buys and Pre	ep Days:										
Vorking_SB		CCS	D	1.	00 184.00		purchasing a prep period for the school yes	ar	100.00			

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

SB Home > SB PrepBuy-N	/ult > SB PrepBuy									
Scenario Years Budget FY21	Entity 0235 Allen, DeanES	Job KDG 1 AM/1 PM1 - C10	Employee 00 Employee 1	Position P_10008381_1	KDG 1 AM/1 PM			10	Data Ad hoc	Format
	Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense- Actual Basis	FS Amount Prep Buy			F
	Assumptio	n Assumption	Assumption	Assumption	Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	Gen Fund	CSR	
Enter # of Prep Buys and Prep	o Days:							[		é
Working_SB	CCSD LastName	1.00	183.00		purchasing a prep period for the school year	6,903.68	7,065.91	100	00	

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

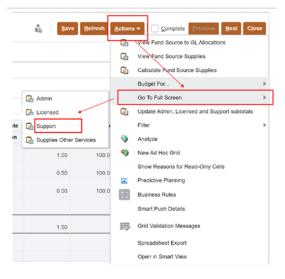
Scenario Year Budget FY21		Entity 0235 Alten, DeanES						🖉 🗘 Data	Ad hoc For	nat
			Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	FS Amount Prep Buy	FS Percentage- Prep Buy	P
			Assumption		Assumption		Assumption	Gen Fund	Gen Fund	
			Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	
nter # of Prep Buys	and Prep Days:									4
DG 1 AM/1 PM1 - 0	C1000 P_1	0008381_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_1	0008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_331715				- Perception of the			
	P 1	0008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM 516040							

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

SCHOOL	BUDGET	r 0				₿ <sup>®</sup>	Save Refresh Actions - Complete Previous	Next	Close
	Years FY21	Entity 0235 Allen, DeanES					$\rightarrow$	/	¢
MANA	GE POS	ITION/EMPLOYEE BUDGET	by WOR	K LOCATION					
Version Working_SB							÷	/	¢
Administrative	Licensed	Support Add'I Earnings Supplies and Oth	er Svcs SLA						
			Emp Name	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra			
			Assumption	Gen Fund	Gen Fund	Gen Fund			
KDG 1 AM/1	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 - C	:1020	P_10008383_1 GRADE 2	CCSD LastName,	7,597.02					
GRADE 4 - C	040	P_10008387_1 GRADE 4	CCSD LastName,		3,827.37	588.78			1
		LICENSED ADDITIONAL EARNINGS TOTAL		14.662.93	6.081.65	1,297.35			Ţ

## Budgeting for a Job 2

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



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

Scenario Budget	Version Y Working_SB F	ears Y21	Entity 0235 Allen, DeanES		Q	Calc Total Position Costs Mass Calc	5					1	Q Ret	Ad hoc	Format
					00	Update Funding Source Allocations Edit Position Info Go to Licensed Summary	•		Shared Position	Months Work Override	Hours Per Day Override		Start Date	Eff Stop Date	P
FRST AID/S	FTY AST - N0090	P_100	08400_1 FRST AID/SFTY AST	Emplo	G	View Fund Source to GL Allocations		7	Haaanipoon	09 Months	Costor Allocation	12/2	and the second second	rassumption	-
ELEM SCHO	OOL CLERK - N0143	P_100	08404_1 ELEM SCHOOL CLERK	Emplo	Ch	View Fund Source Supplies		1	_	11 Months	8.00	12/3	2/19		-
SCH OFFIC	E MANAGE - N0310	P_100	08411_1 SCH OFFICE MANAGE	Emplo	C	Calculate Fund Source Supplies		þ		11 Months	8.00	12/3	2/19		
COMPUTER	TECH I - N1655	P_100	08412_1 COMPUTER TECH I	Emplo		Budget For		D. 4	New Position	-		12/3	2/19		- 18
		P_200	03817_1 COMPUTER TECH I	Emplo	G	Delete Position Info					4.00	7/1/	20		
CUSTODIAN	N - N8040	P_100	05637_1 CUSTODIAN	Emplo				-	rep Buyout - Licer		7.00	4/8/	20		
		P_100	08413_1 CUSTODIAN	Emplo		Go To Full Screen	*	C 4	dd-On and Extra -	Licensed	7.00	7/1	20		
HD CUST I	N8110	P_100	08414_1 HD CUST I	Emplo	C	Analyze and Fix GL Allocations			dd-On and Extra	Support	8.00	12/3	2/19		
SCHOOL AI	DE - N0100	P_100	08401_1 SCHOOL AIDE	Emplo		Edit		0, 1	ob2- Support Staff		6.50	3/11	/20		
LIBRARY AI	DE - N0105	P_100	08402_1 LIBRARY AIDE	Emplo		Adjust		P.C	TT - Sub Teacher		2.50	12/	2/19		
		P_100	08403_1 LIBRARY AIDE	Emplo				-			4.10	12/2	2/19		
SPTA II - NO	162	P_100	08406_1 SPTA II	Emplo	*#	Supporting Detail		Lg Ir	ncrease Position H	leadcount	0.00	1/15	/20		
				Emplo	01	Change History		528		09 Months	6.00	12/3	2/19		
				Employ		V CONTRACTORING PERMIT		4		09 Months	6.00	1 12/3	2/19		

3. You will be brought to the **SB Position Search-Support Only** form. From the available employees, locate your selection, and select the row by **right-clicking** on the Job. From the menu that appears, select **Copy this Job to Job2**.

SCHOOL	BUDGET	0	G	Copy this Job to Job2						Save	Refresh Action	15 🔻	<u>C</u> omp	Previous	<u>N</u> ext Close
SB Home :	> SB Position In	fo Deta		Edit	•									_	
Scenario Budget	Years FY21	Versic Worki		Adjust	F AID/S	FTY AST	Employee Employee					1	P	🗘 Data	Ad hoc Format
			14	Supporting Detail	Vork	Hrs Per I	Day	Pay Base	Pay Cycle	Primary Pay	District	Current F	TE	Eff Start Date	Eff Stop Date
			61	Change History						Rate	Average Rate				
			â	Lock/Unlock Cells											
		-		Filter	tion ▶	Assumpt		Assumption	Assumption	Assumption	Assumption	Assumpt		Assumption	Assumption
FRST AID/SFT	TY AST - N0090	CC			8		6.00 H	louny	Biweekly	18.14	16.21		0.56	12/22/19	<u>^</u>
				Sort	•										

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

Launch Confirmation Message	×
Select Job2 to proceed	OK Cancel

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

Copy Job1 to Job2					Launch Cancel
* Select FROM Employee	"Employee 1"	C <sub>O</sub>	* Select FROM Position	"P_10008400_1"	20
* Select FROM Job Code	"N0090"	Ç <sub>q</sub>	* Select Work Location	"WL_0235"	2 <sub>0</sub>
* Select TO JOB	"N0090"	50 m	* Select Year	"FY21"	

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

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

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

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

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





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

	нан-зирро	rt Transf > SB Position		and Charles a								
	sion rking_SB	Entity 0235 Allen, DeanES	Position		YAST Employee	1				/ 0	Data Ad I	hoc Format
		Employee Name		Months Work	Hrs Per Day	Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Current FTE	Eff Start Date	Eff Stop Da
		Assumption		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
090	CCSD La	stName, FirstName El	M_542377	09 Months	6.00	Hourly	Biweekly	18.14	16.21	0.56	12/22/19	
N0143	CCSD La	stName, FirstName El	M_542377	09 Months	6.00	Hourly	Biweekiy	18.14			12/22/19	
	090	090 CCSD La	Employee Name Assumption Og0 CCSD LastName, FirstName EF	Employee Name Assumption CCSD LastName, FirstName EM_542377	Employee Name Months Work Assumption Assumption O90 CCSD LastName FirstName EM_542377 09 Months	Employee Name Months Work Hrs Per Day Assumption Assumption Assumption 090 CCSD LastName, FirstName EM_542377 09 Months 6.00	Employee Name Months Work Hrs Per Day Pay Base Assumption Assumption Assumption Assumption Q90 CCSD LastName FirstName EM_542377 09 Months 6.00 Hourly	Employee Name         Months Work         Hrs Per Day         Pay Base         Pay Cycle           Assumption         Assumption         Assumption         Assumption         Assumption         Assumption         Assumption         Brweekly           090         CCSD LastName, FirstName EM_542377         09 Months         6.00         Hourly         Brweekly	Employee Name         Months Work         Hrs Per Day         Pay Base         Pay Cycle         Primary Pay Rate           Assumption         Assumption         Assumption         Assumption         Assumption         Assumption           090         CCSD LastName, FirstName EM_542377         09 Months         6.00 Hourly         Biweekly         18.14	Employee Name         Months Work         Hrs Per Day         Pay Base         Pay Cycle         Primary Pay Rate         District Average Rate           Assumption         <	Employee Name         Months Work         Hrs Per Day         Pay Base         Pay Cycle         Primary Pay Rate         District         Current FTE           Assumption         Assumptio	Employee Name         Months Work         Hrs Per Day         Pay Base         Pay Cycle         Primary Pay Rate         District         Current FTE         Eff Start Date           Assumption         Assum

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

SCHOOL BUDGET	0			No. 10	ave Refresh	Actions +	Complete Bre	Next	Close
SB Home > SB Position Info D	etail-Support Transf				*				
Scenario Version Yes Budget Working_SB FY						/	0	ta Adhoc Fg	ormat
			Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Dale	Eff Stop Date	Pe
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	G
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	6.00	12/22/19		
ELEM SCHOOL CLERK - N0143	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	2	12/22/19		
	P_10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName, FirstName EM_317741		11 Months	8.00	12/22/19		
SCH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE MANAGE	Employee 1	CCSD LastName, FirstName EM_548030		11 Months	8.00	12/22/19		

11. Click on the **Actions** menu, click **Mass Calc**, and select **Calc Support Positions**. (Please note: If you are making changes to several Support positions, you can use Mass Calc after making *all* desired changes.)

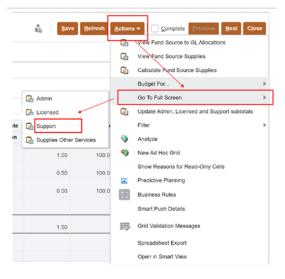
	L BUDGET					86	Save Refresh	Action	s → Complete Previous Ne	xt Close
Scenario		rears	Entity			Calc Admi	n Destions	Q	Calc Total Position Costs	Format
Budget	Working_SB	FY21	0235 Allen, DeanES		Employee Name	Calc Licen			Update Funding Source Allocations	*
						Calc Supp	ort Positions	6	Edit Position Info	Pe
					Assumption	Assumption	Assumption	G	Go to Licensed Summary	G
FRST AID/S	FTY AST - N0090	P_10	008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	Ch	View Fund Source to GL Allocations	10
ELEM SCHO	OOL CLERK - N01	3 P_10	008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months		View Fund Source Supplies	

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

CHOOL	BUDGET	0				<b>1</b> 0	ave <u>R</u> efresh	Actions -	Complete Prev	ious <u>N</u> ext	Close
SB Home Scenario Budget		Detail-Supp Years FY21	Entity 0235 Allen, DeanES						P O Da	ta Ad hoc Fg	ormat
					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/SF	TY AST - N0090	P_100	08400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	6.00	12/22/19		_
ELEM SCHOO	OL CLERK - N01	3 P_100	08400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	2.00	12/22/19		

Budgeting for a Certified Teacher Tutor (CTT)

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



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

						R.	Calc Total Position Costs	
icenario Version Yea Sudget Working_SB FY:							Mass Calc	, Fo
			Employee Name	Shared Position	Months Work Override	Q	Update Funding Source Allocations Edit Position Info	* a
			Assumption	Assumption	Assumption	Ch.	Go to Licensed Summary	
RST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	G	View Fund Source to GL Allocations	
LEM SCHOOL CLERK - N0143	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	G	View Fund Source Supplies	
	P_10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName, FirstName EM_317741		11 Months	C	Calculate Fund Source Supplies	
CH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE MANAGE	Employee 1	CCSD LastName, FirstName EM_548030	-			Budget For	12
OMPUTER TECH I - N1555	P_10008412_1 COMPUTER TECH I	Employee 1		A New Position				10
	P_20003817_1 COMPUTER TECH I	Employee 1	CCSD LastName, FirstName EM_10058970	Prep Buyout - L	icensed	C)	Delete Position Info	
USTODIAN - N8040	P_10005637_1 CUSTODIAN	Employee 1	CCSD LastName. FirstName EM_1020044	Add-On and Ex	tra - Licensed		Go To Full Screen	
	P_10008413_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_1020076	Add-On and Ex	tra - Support	Ch	Edit Position Detail	
D CUST I - N8110	P_10008414_1 HD CUST I	Employee 1	CCSD LastName, FirstName EM_317295	Job2- Support 8		Ch.	Analyze and Fix GL Allocations	
CHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	Employee 1	CCSD LastName, FirstName EM_1004139			-13	100	
IBRARY AIDE - N0105	P 10008402 1 LIBRARY AIDE	Employee 1	CCSD LastName, FirstName EM 10028384	CTT - Sub Teac	her		Edit	-

 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.

SB Home	e > SB Position I	nfo Detail-Si	upport Transf > SB	CTT									
Scenario Budget	Years FY21	Version Working_	Entity SB 0235 Allen, I	DeanES							1	O Data	Ad hoc For
			CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate	Total Comp Exp			FS Pe	rcentage	
			Assumption	Assumption	Assumption	Assumption	Assumption		Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Inter # Hour	rs, Qty and Fund	Src Alloc											
PARA PRO -	CTT - N9909		650.00	3.00					100.00				

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

Contraction of the second		upport Transf > SB	ion.								_	
cenario Years ludget FY21	Version Working_	SB 0235 Allen, I	DeanES							1	Ø Data	Ad hoc Forma
		CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate			FS P	ercentage		
		Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory
nter # Hours, Qty and	Fund Src Alloc											_
ARA PRO - CTT - N99	09	650.00	3.00	Hourty	Biweekly	20.00	100.00					

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

SB Home > SB Position In	fo Detail-Su	pport Transf									
Scenario Version Budget Working_SB	Years FY21	Entity 0235 Allen, DeanES							1	Data Ad	hoc Format
				Eff Start Date	Eff Stop Date	FS Percentage	FS Perce	ntage	Total Fund Src	FS Amount Average Cost Basis	FS Amount A
				Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
INSTRUCTIONAL AST - NO1	0 P_10	008409_1 INSTRUCTIONAL AS	T Employee 1	12/22/19				100.00	100.00		
	P_10	008410_1 INSTRUCTIONAL AS	T Employee 1	12/22/19		100.00			100.00	5,231.18	
TI INS ASST III - N0198	New	Position 12	Vacant			100.00			100.00	31,779.25	
FS WKR FLOATER - N5010	P_10	008415_1 FS WKR FLOATER	Employee 1	12/22/19			100.00		100.00		
SR FOOD SRVC WRKR - N5	030 P_10	023567_1 SR FOOD SRVC WF	KR Employee 1	12/22/19			100.00		100.00		36,95
PARA PRO - CTT - N9909	No_F	Position	No Employee			100.00			100.00	39,916.50	
		M TOTALS			-					471,464.32	36,95

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

#### Budgeting for Licensed Add-On or Extra Time

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

SCHOOL	BUDGET	U						ŝ	ave <u>R</u> efresh	Acti	ons 🔻 🗌 🛄 <u>C</u> a	mplete Previou	s <u>N</u> ext C <u>l</u> ose
Scenario	Years	ntity								G	View Fund S	Source to GL Alloca	tions
		235 Allen, DeanES								G	View Fund S	Source Supplies	
MANA	GE POSIT	ION/EMPLOYEE E	UDGET by WO	RK LOCAT	ION					G	Calculate Fu	und Source Supplie	15
Version							<u> </u>	Prep Buyout - Lic	ensed		Budget For.		
Working_SB Administrative	e Licensed S	Support Add'l Earnings Su	oplies and Other Svcs Si				G	Add-On and Extr	a - Licensed		Go To Full S	creen	
Administrative	e Licensed a	support Addit Earnings Su	opies and Other Svcs Si				- G	Add-On and Extr	a - Support	G	Update Adm	in, Licensed and S	upport subtotals
			Employee Name	Shared Position	Eff Start Dat	e Eff	Stop Date	Planned FTE	FS Percenta	ge	Filter		
			Assumption	Assumption	Assumption	Ast	umption	Assumption	Gen Fund	1	Analyze		
ELE PRINC (	9 MOS) - U7000	P_10026764_1 ELE PRINC (9	CCSD LastName,		7/24/	19		1.00	100	.0 🭳	New Ad Hoc	Grid	
											Show Reaso	ons for Read-Only	Cells
										- 12	Predictive P	lanning	
Admin Jobs		Total All Positions						1.00	)		Business Ru	lles	
											Smart Push	Details	
											. Grid Validati	on Messages	
											*	-	
											Spreadshee		
										_	Open in Sm	art View	
	ARY TOTA	ALS											
				Gen Fun	d CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	A ZFS-EDIT	Food	GATE
	REM	AINING 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 F	UNDS:												
Target	All J	obs	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 SPEN	NT:												
Working_SB	Adm	in Jobs	Total Funding Amount	151,057	.92						151,057.92		

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

	L BUDGE			G	Edit Fund Source Details View Add-On Extra With Fringe		* 80	Save Refr	esh Actions <del>-</del>	100	omplete	Provisa) Next	Close
Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	9	View Add-On Extra GL Code String					1	¢	Data Ad hoc	Format
				G	Calc TEST Edit Adjust	d-On Days ▶	Add-On Minutes	Days of Add- On Minutes	Add-On Note	Extra	Days	Extra Minutes	Days of E Minute
				1	Supporting Detail Change History	ssumption	Assumption	Assumption	Assumption	Assu	nption	Assumption	Assump
KDG 1 AM/1	PM1 - C1000	P_100083	81_1 KDG 1 AM/1 PM		Lock/Unlock Cells								
		P_100083	81_1 KDG 1 AM/1 PM										
		P_100083	81_1 KDG 1 AM/1 PM		Filter	1							

 You will be brought to the SB Licensed AddOnExtra-FS form. You may enter information in the Add-On area (at the top), in the Extra area (at the bottom), or both if appropriate. When you are done entering values, click Save.

SB Home	> SB LicAddOn-Muit > SB Lic	AddOnExtra-F5					6ê			1.122.00			
Scenario Budget	Years Entity FY21 0235 Allen, I	Job DeanES KDG 1 AM/1		mployee Posit mployee 1 P_10	tion 1008381_1 KDG 1 /	M/1 PM					+	/	¢
⊿ Mana	age Licensed Add	-On (PERS)											
		Employee Nam	e Add-On Days	Add-On Minute	es Days of Add-O	n Add-On No	te Earnings Expen	H .		FS Per	entage-Add-On		
		Assumption	Assumption	Assumption	Assumption	Assumptio	en ERN_0202 Add-	C Gen Fund	CSR	Title I	21st Century		Sp Ed
Enter Add-C	On # Days, Minutes and Fund	ng:											
Working_SI	8	CCSD LastName,		19.0	0 18	19 minutes for each da		100.00					
		4											
4 Mana	ige Licensed Extr												,
	-	Employee Name	Extra Days	Extra Minutes	Days of Extra MI	Extra Note	Earnings Expens			FS Perce	ntage-Extra		
		Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	CSR	Title I	21st Century	Sp	Ed
Enter Extra	# Days, Minutes and Funding	c.											
	в	CCSD LastName,	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.

 Upon being returned to the SB Licensed AddOnExtra-FS form, note that the FS Amount Add-On and/or FS Amount Extra have auto-calculated. Return to the previous form by clicking the SB Licensed AddOn-Mult link.

Scenario Years Entity Budget FY21 0235 Allen, Do	Job anES KDG 1 AM/1		nployee Positi	on 008381_1 KDG 1 A	M/1 PM					+	1	¢
Manage Licensed Add-												
	Employee Name	Add-On Days	Add-On Minute	s Days of Add-On	Add-On Note	Earnings Expens	FS Amount Add-			FS Perc	entage-	Add-O
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR	Title I	2	Ist Cer
nter Add-On # Days, Minutes and Fundin	9:											
	CCSD				19 minutes							
Vorking_SB	LastName.		19.00	184.00	for each day	2.637.83	3,471.38	100.00				
	- C - C - C - C - C - C - C - C - C - C											
	4											
Manage Licensed Extra	10											,
Manage Licensed Extra	Employee Name	Extra Days				Earnings Expens FS				FS Perce		
Manage Licensed Extra	10	Extra Days Assumption	Extra Minutes Assumption					Gen Fund	CSR	FS Perce Title I		tra Centu
✓ Manage Licensed Extra Enter Extra # Days, Minutes and Funding:	Employee Name							Gen Fund	CSR			

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

SCHOO	L BUDGE	Т			(A)		85	Save Refree	h Actions +	Complete	Previous Next	Close
	e > SB LicAddO			G	Edit Fund Source Details		*0					
Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	G	View Add-On Extra With Fringe View Add-On Extra GL Code String					/ 0	Data Ad hoc	Format
				Q	Calc TEST Edit Adjust	vdd-On Days	Add-On Minutes	Days of Add- On Minutes	Add-On Note	Extra Days	Extra Minutes	Days of I Minute
				12	Supporting Detail	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assump
				61	Change History						-	-
KDG 1 AM/1	PM1 - C1000	P_100083	81_1 KDG 1 AM/1 PM	a	Lock/Unlock Cells		19.00	184,00	19 minutes for each day of the school year	2.00		

6. As with the SB Licensed AddOnExtra-FS form, the fringe benefits information shows in the Add-On area (at the top), in the Extra area (at the bottom) or both if appropriate. To return to the School Budget form, click on the SB Home link. You may now view the updated Licensed Add-On and/or Extra totals in the Summary Totals area and in the Additional Earnings tab.

Scenario Version Yea Budget Working_SB FY			Position P_10008381_1						+	1 0
VIEW LICENSED	ADD-ON WITH FRINGE B	ENEFITS								
		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
arnings 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	219.8
enefits Expense-Add-On	Public Emp Retirement System	771.56	64.30	64.30	64.30	64.30	64.30	64.30	64,30	64.3
	Occupational Injury Management	22.42	1.87	1.87	1.87	1.87	1.87	1.87	1.87	10
	State Unemployment Ins	1.32	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.
	Medicare	38.25	3.19	3.19	3.19	3.19	3.19	3.19	3.19	3.
	TOTAL ADD-ON & FRINGE BENEFITS	3,471.38	289.28	289.28	289.28	289.28	289.28	289.28	289.28	289.
			289.28	289.28	289.28	289.28	289.28	289.28	289.28	289.
VIEW LICENSED	TOTAL ADD-ON & FRINGE BENEFITS	NEFITS								289.
	EXTRA WITH FRINGE BE	NEFITS YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
arnings Expense-Actual Basis	EXTRA WITH FRINGE BE	NEFITS YearTotal 650.40	<b>Jul</b> 54.20	Aug 54.20	<b>Sep</b> 54.20	<b>Oct</b> 54 20	<b>Nov</b> 54.20	Dec 54.20	<b>Jan</b> 54.20	<b>Feb</b> 54.2
arnings Expense-Actual Basis	EXTRA WITH FRINGE BE ERN_0151 Extra (NO PERS) Occupational injury Management	NEFITS YearTotal 650.40 5.53	Jul 54.20 0.46	Aug 54.20 0.46	Sep 54.20 0.45	<b>Oct</b> 54 20 0 46	Nov 54.20 0.46	Dec 54.20 0.46	<b>Jan</b> 54.20 0.46	<b>Feb</b> 54.2 0.4
VIEW LICENSED amings Expense-Actual Basis enefits Expense-Extra	EXTRA WITH FRINGE BE	NEFITS YearTotal 650.40	<b>Jul</b> 54.20	Aug 54.20	<b>Sep</b> 54.20	<b>Oct</b> 54 20	<b>Nov</b> 54.20	Dec 54.20	<b>Jan</b> 54.20	

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.

Scenario Budget		Entity 0235 Allen, DeanES							C. C.	View Fund Source to GL Allocations View Fund Source Supplies
MAN	AGE POSI	TION/EMPLOYEE BUDG	SET by WO	RK LOCATI	ON				G,	Calculate Fund Source Supplies
/ersion Norking_SB						(	Prep Buyout - Lice	insed		Budget For
		Support Add'l Earnings Supplies a	od Other Suce SI	A			Add-On and Extra	- Licensed		Go To Full Screen
- contract of	ave Endliged	owners war centilities a	N OLIVI OYUS OL	^			🔒 Add-On and Extra	- Support	C:	Update Admin, Licensed and Support subtotals
			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	e Planned FTE	FS Percentage		Filter
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	-	Analyze
ELE PRIN	IC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.0	۰	New Ad Hoc Grid
										Show Reasons for Read-Only Cells
									i i	Predictive Planning
Admin Jo	bs	Total All Positions					1.00		+ - × +	Business Rules
										Smart Push Details
									IV	Grid Validation Messages
										Spreadsheet Export
										Open in Smart View

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

SCHOO	L BUDGET	U		0	Edit Fund Source Details				Ng S	ave <u>R</u> efresh	Actions +	Complete Bre	Nous Next	Close
SB Home	e > SB SupAddOn	-Mult		C.	View Add-On Extra With Fringe									
Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanE	0	View Add-On Extra GL Code String							/ 0 1	ta Adhoc F	ormat
				*1	Edit Adjust Supporting Detail			Days of Add- On Hours	Add-On Hours	Add-On Note	Days of Extra Hours	Extra Hours	Extra Note	C Lio Or
				61	Change History			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	At
CUSTODIAN	N - N8040	P_1000	5637_1 CUSTODIAN	a	Lock/Unlock Cells		00441		1			1		-
		P_10008	113_1 CUSTODIAN		Filter		200761	-						
HD CUST I	N8110	P_10008	8414_1 HD CUST I		Sort		295							
SCHOOL AI	DE - N0100	P_10008	3401_1 SCHOOL AI			1	41392							
LIBRARY AI	DE - N0105	P_10008	1402_1 LIBRARY AI	1	Analyze		28386							
		P_10008	9403_1 LIBRARY AI	۰,	New Ad Hoc Grid		128386							
SPTA II - NO	162	P_1000	8406_1 SPTA II		Show Reasons for Read-Only Cells		149345							
		P_10008	3406_1 SPTA II	100	Predictive Planning		90528					010	1	
		P_1000	3406_1 SPTA II	RB	Business Rules		789						1	
		P_1000	3406_1 SPTA II	No.			930						1	
PE INSTR A	SST - N0179	P_1000	3407_1 PE INSTR A		Smart Push Details		22402			-				
		P_1000	408_1 PE INSTR A				322402							
INSTRUCT	ONAL AST - N019	0 P_1000	409_1 INSTRUCTIO	NAL AS	T CCSD LastName, FirstName EM	54	2473							
		P_10008	410_1 INSTRUCTIO	NALAS	T CCSD LastName, FirstName EM	_54	2473							

3. You will be brought to the **SB Support AddOnExtra-FS** form. You may enter information in the **Add-On** area (at the top), in the **Extra** area (at the bottom), or both if appropriate. When you are done entering values, click **Save**.

	RASST - NO179 E		tion 0008407_1 PE INS	TR ASST					+	1	¢
		-	-								
	e Max Workdays	Max Hours	Days of Add-O	n Add-On Ho	urs Add-On Note	Earnings Expens			FS Perce	ntage-A	dd-On
Assumption	Assumption	Assumption	Assumption	Assumpti	on Assumption	ERN_0202 Add-C	Gen Fund	CSR	Title I	21	st Cen
Funding											
11-11-11-11-11-11-11-11-11-11-11-11-11-			-								
CCSD LastName,			183.00	0	2 additiona		100.00				
(											
Extra (NO PERS	)										
Employee Name	Max Days-Extra	Days of Extra Hc	Extra Hours	Extra Note	Earnings Expens			FS Perce	ntage-Extra		
Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	CSR	Title I	21st Century	Sp	Ed
unding:											
	CCSD LastName, Findling: CCSD LastName, Findling: CCSD Extra (NO PERS) Employee Name	Employee Name Max Workday Assumption Assumption CCSD LasINerme, Finistration Extra (NO PERS) Employee Name Max Days-Extra Assumption Assumption	Employee Name Max Workdays Max Hours Assumption Assumption Assumption Funding: CCSD LasiName, Flashiame Extra (NO PERS) Employee Name Max Days-Extra Days of Extra Hc Assumption Assumption Assumption	Employee Name     Max Workdays     Max Hours     Days of Add-Or       Assumption     Assumption     Assumption     Assumption       Funding:     CCSD     Assumption     Assumption       CCSD     LastName,     193.00       Extra (NO PERS)     Employee Name     Max Days-Extra       Employee Name     Max Days-Extra     Days of Extra Hc       Extra (NO PERS)     Assumption     Assumption	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Ho         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption         Funding:       CCSD       LastName,       183.00       183.00       183.00         Extra (NO PERS)       Employee Name       Max Days-Extra       Days of Extra He       Extra Hours       Extra Note         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       Assumption         Funding:	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note       Earnings Expension         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       ERN_0202 Add-C         Funding:	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note       Earnings Expent         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       Environment         Funding:	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note       Earnings Expent         Assumption       Assu	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note       Earnings Expens       FS Percentage         Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       Assumption       CSR       Title I         Funding:       CCSD       LastName,       183.00       2       2       100.00       100.00       Image: CSR       Image: CSR       Image: CSR       Image: CSR       Image: CSR       Image: CSR       100.00       Image: CSR       Image: CS	Employee Name       Max Workdays       Max Hours       Days of Add-On       Add-On Hours       Add-On Note       Earnings Expent       FS Percentage-A         Assumption       ERN_0202 Add-C       Gen Fund       CSR       Title 1       21st         Funding:       CCSD       LastName,       Image: Cost and the state of

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

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

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

4. Upon being returned to the SB Support AddOnExtra-FS form, note that the FS Amount Add-On and/or FS Amount Extra columns have auto-calculated. Return to the previous form by clicking the SB Support AddOn-Mult link.

Scenario Budget	Years Entity FY21 0235	y Job Allen, DeanES PE INSTR		nployee Positi	on 008407_1 PE INS1	TRACET.					-	1	0
	the second second	Add-On (PERS)	ASSI - NUTTS EI	spoyee 1 P_10	000407_1 PE INS	IR ASSI					2	19.52	
man	ige ouppoir A		Max Workdays	Max Hours	Days of Add-Or	Add-On Hour	e Add-On Note	Earnings Expen	ES Amount Add.				FS Pe
		Assumption	Assumption	Assumption	Assumption	Assumption				Gen Fund	CSR		Title
inter Add-	On # Days, Hours and I	Funding:											
Vorking_S	в	CCSD LastName.	194.00	7.50	183.00	20	2 additional hours each	5,453.40	7,176.67	100.00			
		3											
• Man	age Support E	Extra (NO PERS)											
Man	age Support E			Days of Extra Hc Assumption			imings Expeni F RN_0151 Extra	S Amount Extra Gen Fund	Gen Fund	CSR	FS Percen Title I	tage-Ext 21st C	
	age Support E # Days, Hours and Fu	Extra (NO PERS) Employee Name 1 Assumption	Aax Days-Extra						Gen Fund	CSR			

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

SB Home > SB SupAddOn-Mu	t.	G	Edit Fund Source Details								
	sion Entity rking SB 0235 Allen, DeanE	0	View Add-On Extra With Fringe						Data	Ad hoc Fg	ormat
oouyer rizi yo	Wing 00 Vest Alen, Deale	G	View Add-On Extra GL Code String Edit Adjust	*	Days of Add- On Hours	Add-On Hours	Add-On Note	Days of Extra Hours	Extra Hours	Extra Note	C Lic O
		*4	Supporting Detail		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	A
FRST AID/SFTY AST - N0090 ELEM SCHOOL CLERK - N0143 SCH OFFICE MANAGE - N0310 COMPUTER TECH I - N1555 CUSTODIAN - N8040 HD CUST I - N8110 SCHOOL AIDE - N0100 LIBRARY AIDE - N0105	P_10000400_1 FRST AID/SF P_10008400_1 FRST AID/SF P_10008404_1 ELEM SCHC P_10008411_1 SCH OFFICE P_10008412_1 COMPUTER P_20003317_1 COMPUTER P_10008413_1 CUSTOCIAN P_10008413_1 CUSTOCIAN P_10008414_1 HD CUST I P_10008404_1 SCHOCLAU P_10008402_1 LIBRARY AIC	63 63 63 63 63 63 63 63 63 63 63 63 63 6	Change History Lock/Unlock Cells Filter Sort Analyze New Ad Hoc Orid Show Reasons for Read-Only Cells Predictive Planning Business Rules Smart Push Details	377 377 741 030 58970 00441 00761 295 41392 26386							
SPTA II - N0162	P_10008403_1 LIBRARY AIE P_10008406_1 SPTA II		CCSD LastName, FirstName EM	28386							
	P_10008406_1 SPTA II P_10008406_1 SPTA II P_10008406_1 SPTA II P_10008406_1 SPTA II		CCSD LastName, FirstName EM_ CCSD LastName, FirstName EM_ CCSD LastName, FirstName EM_	10090528 319789							
PE INSTR ASST - N0179	P_10008407_1 PE INSTR AS	ST	CCSD LastName, FirstName EM_		183.00	2.00	2 additional hours each day	66.00	8.00	Extra days to make the	+

6. As with the SB Support AddOnExtra-FS form, the fringe benefits information shows in the **Add-On** area (at the top), in the **Extra** area (at the bottom) or both if appropriate. To return to the School Budget form, click on the **SB Home** link. You may now view the updated Support Add-On and/or Extra totals in the Summary Totals area and in the Additional Earnings tab.

Scenario Version Yea Budget Working_SB FY2	rs Entity Job 21 0235 Allen, DeanES PE INSTR		Position P_10008407_1						+	1
VIEW LICENSED	ADD-ON WITH FRINGE B	ENEFITS								
		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
arnings 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	
enefits Expense-Add-On	Public Emp Retirement System	1,595.12	0.00	0.00	0.00	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	
	State Unemployment Ins	2,73	0.00	0.00	0.00	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	
	TOTAL ADD-ON & FRINGE BENEFITS	7.176.67	C.00	0.00	0.00	797.41	797.41	797.41	797.41	
	6	NEEITS								
VIEW LICENSED	EXTRA WITH FRINGE BE		lut	Aug	Sep	Oct	Nov	Dec	Jan	Feb
	EXTRA WITH FRINGE BE	NEFITS	Jut 0.00	Aug 0.00	Sep 0.00	Oct 874.13	Nov 874.13	Dec 874.13	Jan 874.13	Feb
arnings Expense-Actual Basis	EXTRA WITH FRINGE BE	NEFITS YearTotal		1000						
VIEW LICENSED	EXTRA WITH FRINGE BE	YearTotal 7,867.20	0.00	0.00	0.00	874.13	874.13	874.13	874.13	

# Budgeting for Supplies and Other Services

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

SCHOOL BU	UDGET	0						Sa Sa	we <u>R</u> efresh	Actions -	Complete Previou	Next	Close
Scenario Yea Budget FY2		ntity 235 Allen, DeanES									3		٥
MANAG	E POSIT	ION/EMPLOYEE	BUDGET by WOR	K LOCATI	ON								
Version Working_SB			197								-	1	¢
Administrative	Licensed S	Support Add'l Earnings Su	pplies and Other Svcs SLA										
			Employee Name S	hared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percentag	e Total Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	Allocation Pct	Gen Fund		
ELE PRINC (9 N	MOS) - U7000	P_10026764_1 ELE PRINC (	A MOS) CCSD LastName.		7/24/1	9		1.00	100.0	100.00	151.057.92		
Admin Jobs		Total All Positions				_		1.00			151,057.92		
A SUMMA	RY TOTA	LS		Can Fund	<b>64</b> 0	HODES		Conf. Douglas 1	0	TH. 1 750 ED	T. Fuel		
				Gen Fund						Title I J ZFS-ED	-	GATE	
ALLOCATED FUN		AINING BUDGET TO SPEND		(239.480.88	) (88,205.51)	0.00	0.00	500.00	(00,200.01)	0.00 (415,391.9	n 5,928.16	91,8	42.14
Target	All J	obs	FS Amount Actual Cost Ba	sis 2 355 966 6	6 352.822.04	0.00	0.00	89.000.00	37,200.00	0.00 2.834,988.7	0 42.886.25	91.8	42.14
BUDGET SPENT:												0110	

2. From this screen, you may now enter or edit dollar amounts in the appropriate fund sources available to your school, such as the General Fund. Click **Save** when you are finished updating.

CHOOL	BUDGI	ET O						Save	Refresh Actions - Complete Previous	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES							$\rightarrow$	1	¢
MAN/	AGE PO	SITION/EMPLOYE	E BUDGET	by WORK		N					
Version Working_SB									÷	1	0
Administrativ	e Licensed	Support Add1 Earnings	Supplies and Other	SVC5 SLA							
Period BegBalano	6								÷	1	٥
			Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory			
Enter total	year dollar a	mount to a Funding Source:									-
511654000	0 Extra Duty	Licensed	5,000.00								
511681000	0 Preparation	n Periods									
511795200	0 Extra Duty	Support Staff									
511825900	0 Extra Duty	Administrator									
532000000	0 Education	Services									
533000000	0 Employee	Training									
534000000	0 Other Profe	essional Services									
	0 Legal Servi	leas									-

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

сноог	BUDGE	т						Save	Refresh	Action	s 🕶 🗌 <u>C</u> omplete <u>Previous</u> <u>N</u> ext Clos
Scenario	Years	Entity								Q.	View Fund Source to GL Allocations
Budget	FY21	0235 Allen, DeanES								G	View Fund Source Supplies
MAN	AGE POS	SITION/EMPLOYE	E BUDGET	by WORK	LOCATIO	N				Q	Calculate Fund Source Supplies
/ersion											Budget For
Vorking_SB	a Userand	Current Addi Famiana	Supplies and Othe	- Ci A							Go To Full Screen
dministrativ	e Licensed	Support Add'l Earnings	Supplies and Othe	r SVCS SLA						G	Update Admin, Licensed and Support subtotals
Period BegBalanc											Filter
ведвалапо	e		Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory		۹	Analyze
Enter total	vear dollar an	ount to a Funding Source:	Gen Pana	CON	inde i	21st Century	00 20	victory			New Ad Hoc Grid
	0 Extra Duty L	-	5,000.00								Show Reasons for Read-Only Cells
511681000	0 Preparation	Periods								<b>1</b>	Predictive Planning
511795200	0 Extra Duty S	upport Staff									Business Rules
511825900	0 Extra Duty A	dministrator								_	Smart Push Details
	0 Education S										
533000000	0 Employee Tr	-								₽	Grid Validation Messages
											Spreadsheet Export
	0 Other Profes										also and and and and and
534300000	0 Legal Servic										Open in Smart View

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

CHOOL	20201	59. SCH							16 St	we <u>R</u> efresh	Acti	ons 🔻 📄 <u>C</u> on	Previous	Next	Clo
	Years FY21	Entity 0235 Allen, DeanES											÷	1	0
MANA	GE PO	SITION/EMPLOY	EE BUDGET	by WORK	LOCATIO	N									
/ersion Norking_SB													<b>•</b>	1	¢
Administrative	Licensed	Support Add1 Earnings	Supplies and Oth	er Sves SLA											
Period BegBalance													+	1	¢
			Gen Fund	CSR	Title I	21st Cen	tury	Sp Ed	Victory						
Enter total y	year dollar a	mount 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	Fraining													
5340000000	Other Profe	ssional Services													
5343000000	Legal Servi	ces													
6244000000	Architectur	al Candean Braff													8
	ARY TO	DTALS													
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	A ZFS-EDIT	Food	GATE	e
			FS Amount /	Add-On	7,176.67							7,176.67			
			FS Amount I	Extra	8,052.08							8,052.08			
		All Jobs	Supplies and	d Other Services	5,000.00				88,500.00	37,200.00	2	130,700.00			
			Service Leve	l Agreement	124,905.52	r						124,905.52			
	ET SPENT				2.553.808.64				88.500.00	125,405,51	-	3.208.741.70	36,958.09		0.00

# Exporting a Tab and Budget Totals

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

cenario udget		Entity 0235 Allen, DeanES							G G	View Fund Source to GL Allocations View Fund Source Supplies
A MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION										Calculate Fund Source Supplies
ersion orking SE	3									Budget For
dministra		Support Add'l Earnings Supplies a	nd Other Svcs SL	A						Go To Full Screen
		enthere are a set of the set							R	Update Admin, Licensed and Support subtotals
			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage		Fiter
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	٩	Analyze
ELE PRIM	NC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.0	۹)	New Ad Hoc Grid
										Show Reasons for Read-Only Cells
									Ĩ.	Predictive Planning
Admin Jo	obs	Total All Positions					1.00		+ - x +	Business Rules
										Smart Push Details
									₩	Grid Validation Messages
										Spreadsheet Export
										Open in Smart View

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



Click on the export button for spreadsheet export

3. If you are in **Google Chrome**, the spreadsheet will appear in the downloads tray at the bottom of the screen. Select it by single-clicking on the downloaded file. If you are in **Mozilla Firefox**, a dialog box should appear, indicating that the file will open in Microsoft Excel. Click **OK**.

								A6 🚺	ave Refresh	-	-			COMP.	230
Scenano Budget	Veara FY21	Entry 0235 Altert, DognES											->	1	Ċ
MAN	AGE PC	SITION/EMPLOYEE	BUDGET by WORK	LOCATION	N										
Version Working SB													*	1	K
Administrat	ive Lidens	sed Support. Addi Earnings Su	pplies and Other Sycs ISLA												
			Employee Name Shar	ed Position Ef	1 Start Date	Eff St	op Date	Planned FTE	ES Percenta	ge Tota	I Fund Src	FS Amount Ave	5		
			Spreadshe	et Export				Export Close	Gen Fund	Allo	cation Pct	Gen Fund			
ELE PRIN	C (9 MOS) + 1	U7000 P_10026764_1 ELE PRINC (	a Mos) La	erExport				Coport Close	100			151,057.92			
			Click on the expo	at hullon for ence	adabaal avo										
Admin Joi	bis	Total All Positions	Click of the exp	at buildn for spre	ausneer exp	JON .									
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			-					_					]		
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		TOTALS	-												
		TOTALS	-	Gen Fund				GenF Read by 3						GATE	
SUMI	MARY T		-	Gen Fund			Megnet 0.00		GenF SB178 (m.208.53)					GATE	
	MARY T	TOTALS	FS Amount Actual Cost Basis	1110-841-001				500.00				5,028.1			
SUMI	MARY T	TOTALS	FS Amount Actual Cost Basis	1110-841-001				500.00			CHAR THE DOL	5,028.1		112,364	

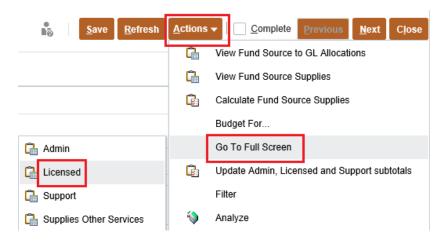
4. Once the Excel file opens, you will be able to view all information contained within the exported tab, including the Totals information.

8 5 0 %	🖌 🖪 🔸		HspWebGrid (14) - Excel			œ –	
File Home Insert	Page Layout Formulas Data		Add-ins Smart View ACROBAT				A sha
- 1 k -	$ \begin{array}{c} & \mathbf{\hat{a}} & \mathbf{\hat{a}} & \mathbf{\hat{a}} \\ & \mathbf{\hat{a}} & \mathbf{\hat{a}} & \mathbf{\hat{a}} \end{array} \\ & \mathbf{\hat{a}} & \mathbf{\hat{a}} & \mathbf{\hat{a}} & \mathbf{\hat{a}} \end{array} $	<ul> <li>Wrap Ter</li> <li>₩ Merge &amp;</li> </ul>	€ 0/ ● 00 Cor	ditional Format as Cell matting · Table · Styles ·	insert Delete Format	∑ AutoSum * Art Fill * Sort & Clear * Filter * 5	
Clipboard 5 F	ont 14	Alignment	75 Number 75	Styles	Cells	Editing	
• I × √	fx .						
A A	В	с	D	E	F	G	
1			0235 Allen, DeanES	BaseData	Budget	Working_58	
2 3 4 5 6 6 7 8 8 9			Employee Name Assumption BegBalance Unspecified Fund Unspecified IO Unspecified Concerea Unspecified Concerea	Shared Position Assumption BegBalance Unspecified Fund Unspecified IO Unspecified FuncArea Unspecified Cost Center	Eff Start Date Assumption BegBalance Unspecified Fund Unspecified IO Unspecified FuncArea Unspecified Cost Center	Eff Stop Date Assumption BegBalance Unspecified Fund Unspecified IO Unspecified IO Unspecified Cost Center	Un Un Unsp Unspe
0 KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName_EM_325191	1	8/7/19	a an an air an	
1 KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		
2 KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 3	CCSD LastName, FirstName_EM_516040	)	8/7/19		
3 KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Vacant	and the second second second second		8/7/19		
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 2	CCSD LastName, FirstName EM_303745	5	8/7/19		
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 3	CCSD LastName, FirstName_EM_553069	)	8/7/19		
7 GRADE 1 - 01010	P_10008382_1 GRADE 1	Employee 4	CCSD LastName, FirstName EM_524230		2/20/20		
GRADE 1 - C1010	New Position 8	Vacant	Vacant				
9 GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411	1	8/7/19		
0 GRADE 2 - 01020	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954	1	8/7/19		
1 GRADE 2 - C1020	New Position 5		Vacant				
2. ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Employee 1	CCSD LastName, FirstName EM_10084404		8/7/19		
3 GRADE 3 - G1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305		7/1/20		
4 GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 2	CCSD LastName, FirstName EM_502600		8/7/19		
5 GRADE 3 - G1030	P_10008386_1 GRADE 3	Employee 3	CCSD LastName, FirstName EM_524230		2/20/20		
6 GRADE 3 - 01030	P_10008386_1 GRADE 3	Employee 4	CCSD LastName, FirstName EM_10014323		8/7/19		
7 GRADE 4 - C1040	P_10008387_1 GRADE 4	Employee 1	CCSD LastName, FirstName EM_10109611		7/1/20		
8 GRADE 4 - C1040	P_10008387_1 GRADE 4	Employee 2	CCSD LastName, FirstName_EM_316074	l	8/7/19		
9 GRADE 4 - C1040	P_10008387_1 GRADE 4				7/1/20		
0 GRADE 5 - C1050	P_10008389_1 GRADE 5	Employee 1	CCSD LastName, FirstName EM 546907	1	8/7/19		

## View Employee's Actual Salary Rate

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

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



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

SCHOOL	BUDGE	T 🔁										Ni
SB Home	> SB Position In	fo Detail-Licens	sed Transf									
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES									
				Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percentage		
					Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	G
KDG 1 AM/1 F	PM1 - C1000	P_1000838	8381_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 - C1	1010	P_1000838	008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		1.00		100.0	00
				Employee 2	CCSD LastName, FirstName EM_303745		8/7/19		1.00		100.0	00
				Employee 3	CCSD LastName, FirstName EM_553069		8/7/19		1.00		100.0	00

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



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

Version Position Employee Working_SB P_10008382_1 Employee 1		
		YearTotal
Basic Salary Expense-Actual Basis	Assumption	63,985.00
Benefits Expense <mark>-Actual</mark> Basis	Public Emp Retirement System	18,715.61
	Occupational Injury Management	543.87
	State Unemployment Ins	31.99
	Medicare	927.78
	Certified EGI	7,637.88
TOTAL COMPENSATION EXPENSE-ACTUAL BAS	SIS TOTAL SALARY & FRINGE BENEFITS	91,842.14
Basic Salary Expense-Average Basis	Assumption	61,221.60
Benefits Expense <mark>-Average</mark> Basis	Public Emp Retirement System	17,907.32
	Occupational Injury Management	520.38
	State Unemployment Ins	30.61
	Medicare	887.71
	Certified EGI	7,637.88
TOTAL COMPENSATION EXPENSE-AVG BASIS	TOTAL SALARY & FRINGE BENEFITS	88,205.51

### Compensation Monthly Spread Detail

# Printing Budget Plans

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



2. Click the Financial Reports icon

E ORACLE Planning and Budgeting Cloud: CCSDBUD								ñ O	tonako
	Tasks	Data	Reports	Approvals	Academy		~		
Reports			-					🔲 🔀   Import 🛙	Sefresh Create
Search Q Bullerary T At Types									
Name	Descriptio	n :				Created	Last Modified	Report Format	Actions
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							disatas Siltuta		

3. Uncheck the **Show POV Options** checkbox, expand the **CCSD** folder to the **Budget** folder, and click the PDF action icon to the right of the **SB\_ALLFUNDS\_V1** report.

ORACLE Planning and Budgeting Cloud: CCSDBUD			* * * *
	Taska Data	Reports Approvale Academy	
Financial Reports			Settesh Mig
Blow POV Options 😺 Name	Descript	ition	Actions Migrat
A Home			
CCSD			
J BUDGET			
JOBPOSBUD_PLANVSAGT_V1	Position F	FTE by Job-Budget vs Current	
SB_ALLFUNDS_EMP_V1	School St	Integro Budget-All Fund Sources-with Employee Names	
B_ALLFUNDS_NTS_V1	School St	Itrategic Budget All Fund Sources w/ Notes	
SB_ALLFUNDS_PY_FALL	School St	itrategic Budget All Fund Sources	77 <b>2 2 2</b>
SB_ALLFUNDS_PY_FALL2	School St	Itrategic Budget All Fund Sources	U B B U
SB_ALLFUNDS_PY_FALL_V1	Schoel St	aratepic Budget All Fund Sources	
SB_ALLFUNDS_PY_WRKSB	School S	mategic Bunget-All Fund Sources.	
SB_ALLFUNDS_SUM V1	School St	Stategic Budget All Fund Sources	
SB_ALLFUNDS_V1	School 9	thategic Budget-All Fund Sources	888 9

4. From the prompt pop-up window type your work location directly in the fields (use this format: WL\_0235). Copy it to the other three Enter Entity prompts, and then click OK to proceed. The screen will go blank, however, the report is processing. Please give it about 30 seconds. Any report in the list can be ran following the same navigation.

Respond to Prom	npts at Report Level 🖂				
Prompt	Selection	Туре	Source		
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS Grid: GenFund	1	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS Grid: All	_V1	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS Grid: GF Supp	_V1	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS Grid: All	_V1	
			Grid: All		
				-	

5. 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.

CCSD CML CATT WL_0235				0235	ategic Budget Pl Allen, DeanES 2021 School Year	an				1/	23/2021
ALL FUNDING SOURCES		Gen Fund	GenF S8178	CSR	Food	Gen GATE	GenF Read by 3	Sp Ed	Cost	Cost (%)	
Plan Summary Admin Jobs Licensed Jobs Licensed Jobs Licensed Jobs Support Jobs Support Jobs Support Jobs Support Jobs Support Jobs We_0235	Total Funding Amount Total Funding Amount FS Amount Phep Bay FS Amount Both Total Funding Amount Total Funding Amount Total Funding Amount FS Amount Add-On FS Amount Add-On FS Amount Add-On FS Amount Add-On FS Amount Fatha Supplies and Other Services Service Level Agreement	151.05 1,764.11 14.86 6,00 1,29 471,46 7,17 8,05 124.90 2,548,89	0 88,206 3 2 7 4 4 7 2 2 37,200 6		36,958	88.2 88.2	88,500		14,663 6,082 1,297 637,878 7,177 8,052 125,700 124,906	71.91% 0.38% 0.03% 16.64% 0.19% 0.21% 3.26%	
Job	Position	Assumption Shared Mont	hs Work	FS	Gen Fund Gen Fun 3 Amount arrage Cost FS Amount		Gen Fund GenF t FS Amo	unt FS Amount	Food FS Amount	Gen GATE S FS Amount FS An Average Cost Actual	
ELE PRINC (9 MOS) - U70	PGRP 050	Position Over		Planned FTE Ba	sis Prep Buy \$151,057.92 \$151,057.92	Add-On	Extra Basis	Basis	Besis	Basis Basis	
Total Administrative St	-				302,115.84						_
KDG 1 AM/1 PM1 - C1000	P_10008381_1	0		7 1 7 1	\$88,205.51 \$7,065 \$88,205.51 \$88,205.51 \$88,205.51	91 \$3,471.3 \$2,254.2					

SB\_ALLFUNDS\_V1

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

SB_ALLFUNDS_V1		t <sub>ij</sub> Cose
PDF Preview		
S8_ALLFUNDS_V1	1 / 3	6 ± 8

Promoting (Submitting) a Work Location Budget

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



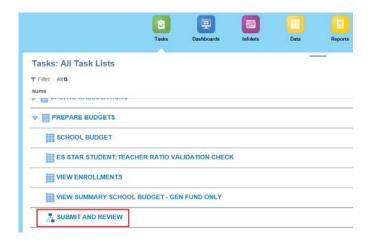
2. Click on the Tasks icon



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



4. Click the option Submit and Review.



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

Filter			• 10	•	Clear All	Apply	Cancel
		Select Actual					
	Scenario	Budget					
	Version	DefaultScen PositionRequest					
	Approvals Status				$\sim$		
	Approval Unit					R.	
More							

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

Filter: Budget tl Working_SB tl							
Filter			<b>N</b> ô	•	Clear All	Apply	Cancel
	Scenario	Budget			~		
	Version	Strategic Budget			~		
A	Approvals Status	Select					
	Approval Unit	Tentative Budget				₽	
		Final Budget				4	
		Amended Final Budget					
More		Base					
		BU Version_1					al
		CurrSaved					
		Final					
		LastSaved					
		SharedPositions					
		Target					
		What if					
		Loaded Assumption - We	orking				
		Strategic Budget					

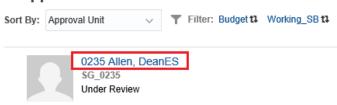
7. Click **Apply**.

Filter		Clear All	Apply	Cance <u>i</u>
Scenario	Budget	~		
Version	Strategic Budget	~		
Approvals Status		$\sim$		
Approval Unit		Ę		

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

#### SUBMIT AND REVIEW

#### Approvals



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

	Action	Promote	$\sim$
	Annota	tion	
=			
<u> </u>			
	Chang	ge Status	

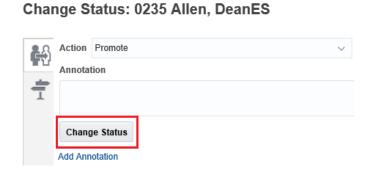
Change Status: 0235 Allen, DeanES

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

Change Status: 0235 Allen, DeanES

÷	Action Promote Annotation	~
1		
	Change Status	

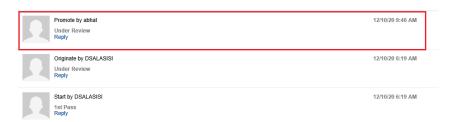
11. By clicking **Change Status** you are submitting your budget.



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

Char	ige S	tatus: 0235 Allen, DeanES				Refresh	D <u>o</u> ne
<b>F</b>	Action	Promote	$\sim$	Owner	<automatic></automatic>		$\sim$
TY	Annota	tion					
-							
	Chang	ge Status					

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



14. Click Done.

Change Status: 0235 Allen, DeanES				
2.0	Add Annotation			
	Promote by abhat Under Review Reply	12/10/20 9:46 AM		
	Originate by DSALASISI Under Review Reply	12/10/20 6:19 AM		
	Start by DSALASISI 1st Pass Repty	12/10/20 6:19 AM		

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 11 Working\_SB 11

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



Now that your location budget has been submitted, the School Budget form will **no longer allow any changes to be made**. You can verify this by going to **Prepare Budgets** and then selecting **School Budget**.

Once in the School Budget form, note that you cannot add, remove, or modify any information within any of the tabs or grids in the form.

#### **Error Messages when Submitting a School Budget**

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

	VL_0279 G 0279				_
	nder Review	Fa	ailed: Inva	lid Data	
			ST Ratio Limit	Students	Difference
Elementary Star 1 or 2 Schools					
Grade1	Elem - Star 1 or 2 - Gra	de 1	16.00	19.50	-3.50
Grade2	Elem - Star 1 or 2 - Gra	de 2	16.00	16.00	0.00
Grade3	Elem - Star 1 or 2 - Gra	de 3	19.00	20.33	-1.33
Elementary Star 3 or 4 or 5 Schools					
Elementary Star 3 or 4 or 5 Schools					
Elementary Star 3 or 4 or 5 Schools	Value Count		3.00	3.00	0.00

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.

SCHOOL BUDGET 0			 4	Save linked Action .	Domplete	Destan	Next	Classe	
Scenano Budget	Years FV21	CONTENANTES						+ /	0

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

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



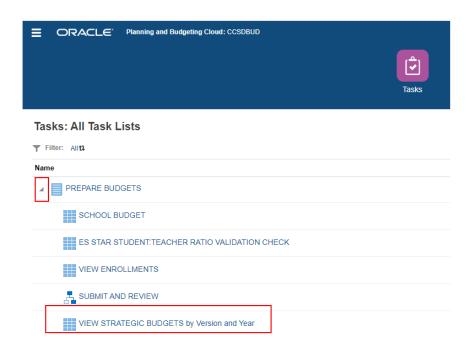
Click SAVE to update the ratios

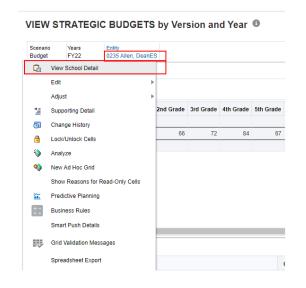
## How to View Prior Year Budget Plans

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



2. From the Task List window, click the dropdown arrow next to **Prepare Budgets** and select **View Strategic Budgets by Version and Year.** 





3. Right Click on your location name and select View School Detail.

4. You can select the available Versions; fall, spring, or Strategic Budget by clicking on the **Context Version** field.

VIEW STRATEGIC BUDGETS by Version and Year <sup>1</sup>

nario Iget	Context Version Fall Budget	Context Entity 0235 Allen, DeanES	Current Year of View FY21							
MAN	AGE POSI	TION/EMPLO	OYEE BUDG	ET by WOR	K LOCATIO	N				
dministra	tive Licensed	Support Add'l Ear	nings Supplies an	d Other Svcs SLA						
				E Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
				Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRIN	IC (9 MOS) - U700	P_10026764_1 E	LE PRINC (9 MOS)		7/24/19		1.00	100.00	100.00	151,057.92
SUM	MARY TOT	ALS								

Note: **User Preferences** for **Current Year of View** must be set-up to access prior year plans. To set up your user preferences, go to the Navigator > User Preferences > User Variables > Years > select FY21. For detailed instructions, please refer to Course 02.