

CCSD School Budget Planning Tool Essentials Guide

Table of Contents

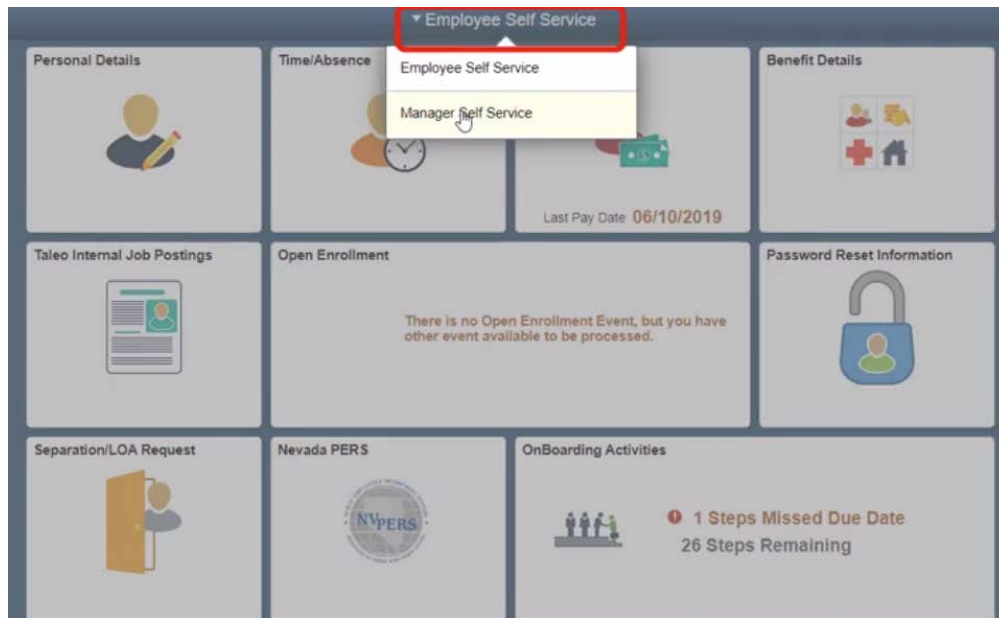
Accessing the CCSD Budget Planning Tool through HCM PeopleSoft	2
User Preferences.....	4
Accessing and Editing the School Budget.....	8
Navigating and Understanding the School Budget	10
Student Teacher Ratio Validation (Elementary schools only):	18
Increasing the Headcount of an Existing Position	20
Adding and Adjusting Positions	23
Change the Funding Source of a New Position	27
Removing a Position	30
Transfer to Existing Position	33
Transfer to New Vacant Position	36
How to Clear a Transfer - Reinstating a Transfer to its Original Position	42
Budgeting for a Shared Position	48
Budgeting for a Prep Buy Out	50
Budgeting for a Job 2	53
Budgeting for a Certified Teacher Tutor (CTT)	58
Budgeting for Licensed Add-On or Extra Time	60
Budgeting for Support Add-On or Extra Time	64
Budgeting for Supplies and Other Services	68
Exporting a Tab and Budget Totals	70
View Employee's Actual Salary Rate	72
Printing Budget Plans.....	74
Promoting (Submitting) a Work Location Budget	77
How to View Prior Year Budget Plans	83

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

CCSD School Budget Planning Tool Essentials Guide

Accessing the CCSD Budget Planning Tool through HCM PeopleSoft

1. Log into HCM PeopleSoft using your **Active Directory (AD) credentials**.
2. You will be brought to the Employee Self Service Dashboard. Using the Top Menu, switch to **Manager Self Service**.

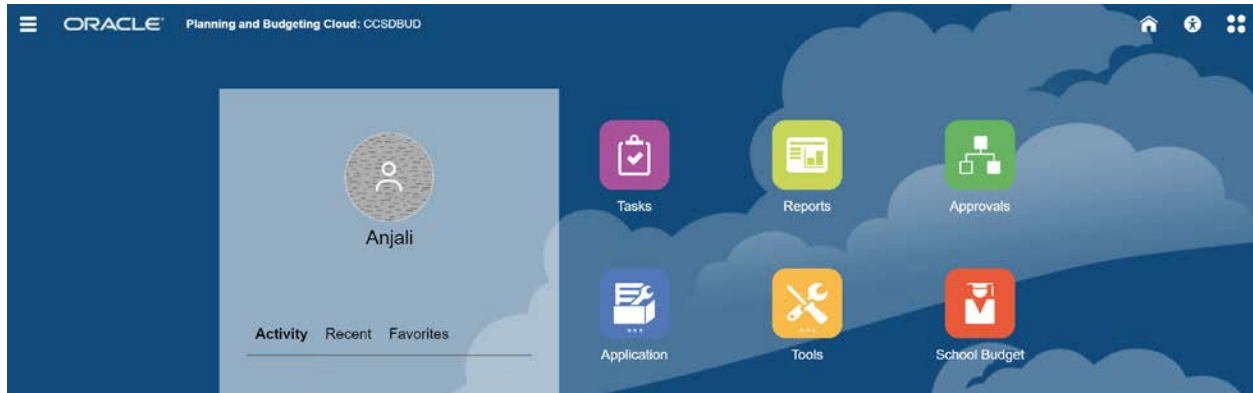


3. From the MSS Dashboard, select the **Budget Planning Tool** tile.



CCSD School Budget Planning Tool Essentials Guide

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



CCSD School Budget Planning Tool Essentials Guide

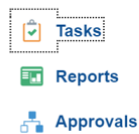
User Preferences

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



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

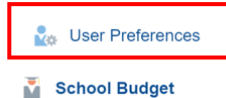
Navigator: Planners



Application

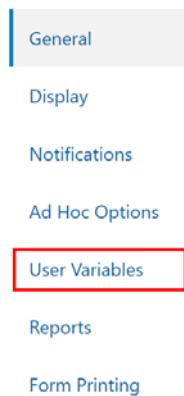


Tools



3. Click on User Variables:

Preferences



CCSD School Budget Planning Tool Essentials Guide

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

Save

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

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

Select a Member

OKCancel

YearsFY21

Search Years

Years

All Years

No Year

FY16

FY17

FY18

FY19

FY20

FY21

FY22

FY23

FY24

FY25

MembersYears > All Years > FY21






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

CCSD School Budget Planning Tool Essentials Guide

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

Save

User Variables

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

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

Select a MemberOKCancel

Element
FS_0235

Search Element

Element

GL Measures

FSGROUP

FS_0232

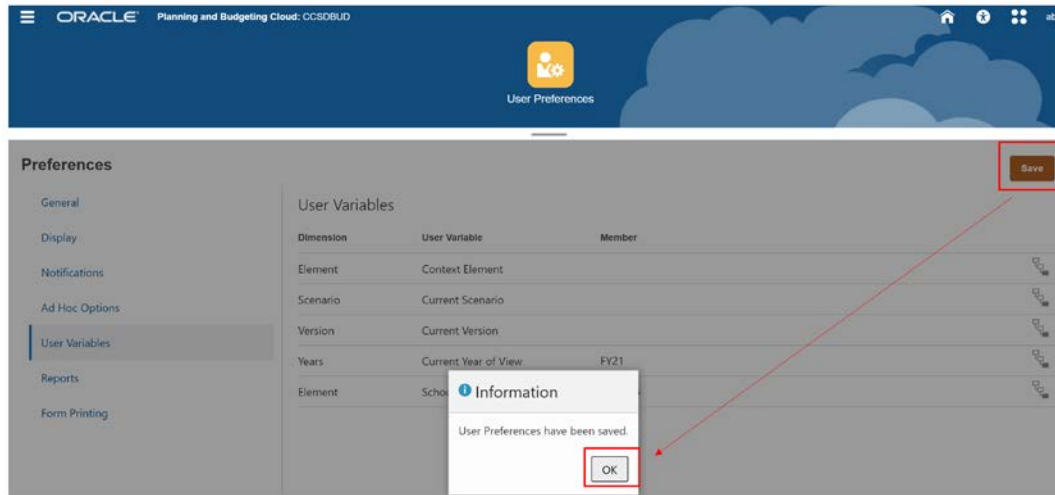
FS_0233

FS_0234

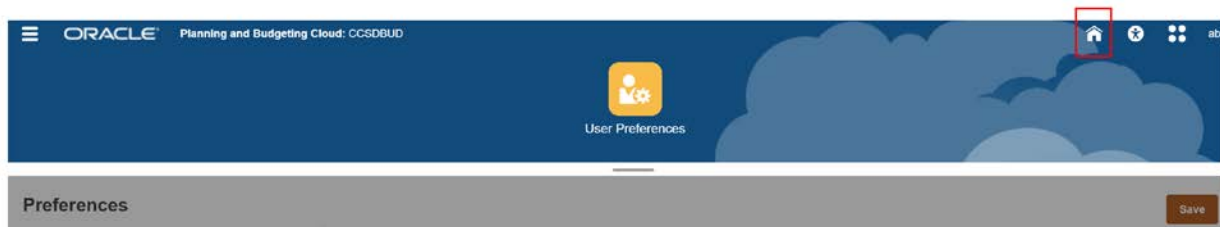
✓ FS_0235

CCSD School Budget Planning Tool Essentials Guide

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



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



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

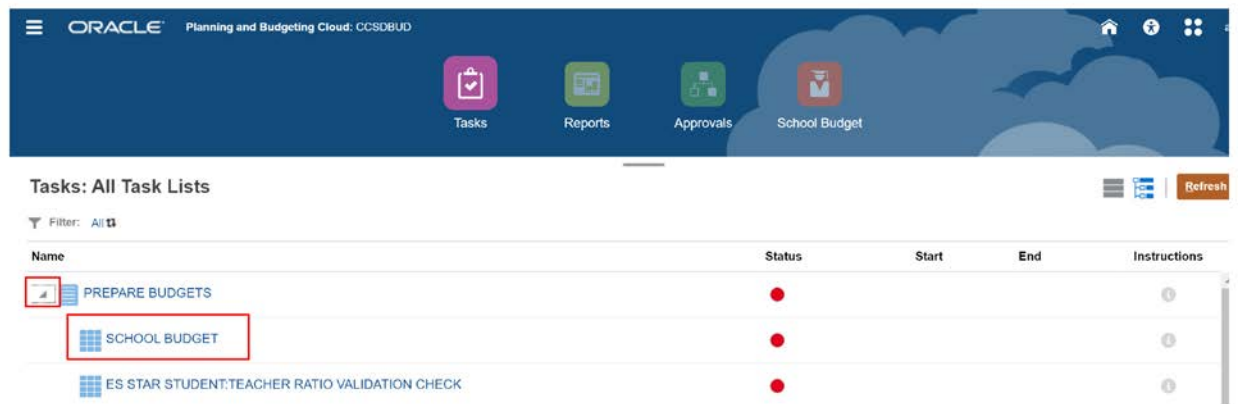
CCSD School Budget Planning Tool Essentials Guide

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**.



CCSD School Budget Planning Tool Essentials Guide

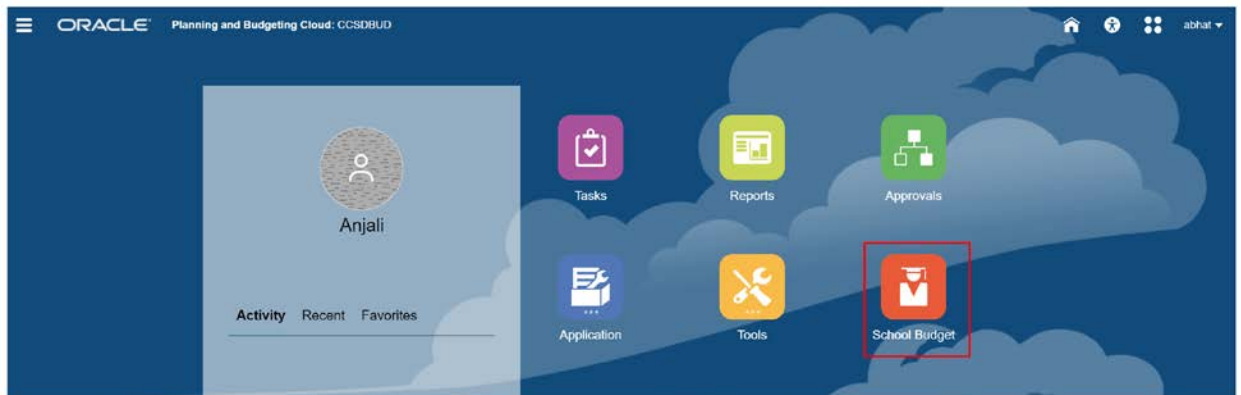
3. Confirm you are accessing the correct work location in the **Entity** field. (This will be useful if you are assigned to **multiple locations**). **If** you need to change the work location displayed, click on the **Entity** link. From the Select a Member window, select your work location and click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

The screenshot shows the 'SCHOOL BUDGET' header with a red box around the 'Entity' field, which contains the text '0235 Allen, DeanES'. Below the header is a section titled 'MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION'. At the bottom, there are tabs for 'Administrative', 'Licensed', 'Support', 'Add'l Earnings', 'Supplies and Other Svcs', and '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).

The screenshot shows the 'Actions' dropdown menu open. The 'Go to Full Screen' option is highlighted with a red box. The 'Licensed' option in the left sidebar is also highlighted with a red box. The background shows a budget grid with columns for 'Admin', 'Licensed', 'Support', and 'Supplies Other Services'.

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



CCSD School Budget Planning Tool Essentials Guide

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).

SCHOOL BUDGET

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19	1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14	
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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

SCHOOL BUDGET

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19	1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14	
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name Assumption	Shared Position Assumption	Eff Start Date Assumption	Eff Stop Date Assumption	Planned FTE Assumption	FS Percentage Gen Fund	Total Fund Src Allocation Pct	FS Amount Aver Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19	1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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.

SCHOOL BUDGET ⓘ

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

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name Assumption	Shared Position Assumption	Eff Start Date Assumption	Eff Stop Date Assumption	Planned FTE Assumption	FS Percentage Gen Fund	Total Fund Src Allocation Pct	FS Amount Aver Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19	1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

CCSD School Budget Planning Tool Essentials Guide

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.

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(86,205.51)	0.00	(195,428.81)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(86,205.51)	0.00	(195,428.81)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

CCSD School Budget Planning Tool Essentials Guide

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.

SCHOOL BUDGET

Save

Refresh

Actions

☐ Complete

Previous

Next

Close

Scenario Budget

Years FY21

Entity 0255 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative

Licensed

Support

Add'l Earnings

Supplies and Other Svcs

SLA

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions				1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(86,205.51)	0.00	(195,428.81)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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

SCHOOL BUDGET

Save Refresh Actions Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeenES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

		Employee Name Assumption	Shared Position Assumption	Eff Start Date Assumption	Eff Stop Date Assumption	Planned FTE Assumption	FS Percentage Gen Fund	Total Fund Src Allocation Pct	FS Amount Aver Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions					1.00			151,057.92

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
	REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(86,205.51)	0.00	(195,428.81)	5,928.16	91,842.14	
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

CCSD School Budget Planning Tool Essentials Guide

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 ⓘ

Save Refresh Actions ▾
☐ Complete
 Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES
 ➡ ✎ ⚙

▲ **MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION**
➡ ✎ ⚙

Version Working_SB
 ➡ ✎ ⚙

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

		Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver:
		Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions					1.00			151,057.92

▲ **SUMMARY TOTALS**

			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	▲ ZFS-EDIT	Food	GATE
	REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	86,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

CCSD School Budget Planning Tool Essentials Guide

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).

SCHOOL BUDGET

Save

Refresh

Actions

Complete

Previous

Next

Close

Scenario Budget

Years FY21

Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative

Licensed

Support

Add'l Earnings

Supplies and Other Svcs

SLA

		Emp Name	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra
		Assumption	Gen Fund	Gen Fund	Gen Fund
	LICENSED ADDITIONAL EARNINGS TOTAL		7,597.02	6,081.85	1,297.35
PE INSTR ASST - N0179	P_10008407_1 PE INSTR ASST	CCSD LastName,		7,176.67	8,052.08
	SUPPORT ADDITIONAL EARNINGS TOTAL	CCSD LastName		7,176.67	8,052.08

SUMMARY TOTALS


		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
	REMAINING BUDGET TO SPEND	(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,426.81)	5,928.16	91,842.14	
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												



CCSD School Budget Planning Tool Essentials Guide

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.



SCHOOL BUDGET 

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

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB  

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

Period: BegBalance  

	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE	Sp Ed
Enter total year dollar amount to a Funding Source:						
5116540000 Extra Duty Licensed						
5116810000 Preparation Periods		88,500.00		37,200.00		
5117952000 Extra Duty Support Staff						
5118259000 Extra Duty Administrator						
5320000000 Education Services						
5330000000 Employee Training						
5340000000 Other Professional Services						
5343000000 Legal Services						
5346000000 Architectural Services						

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE
REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14
ALLOCATED FUNDS:											
Target	All Jobs	FS Amount Actual Cost Basis									
		2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:											

CCSD School Budget Planning Tool Essentials Guide

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 BUDGET

SaveRefreshActions

☐ Complete

PreviousNextClose

Scenario Budget

Years FY21

Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

AdministrativeLicensedSupportAdd'l EarningsSupplies and Other SvcsSLA

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

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,842.14	
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,986.70	42,886.25	91,842.14
BUDGET SPENT:												

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.

SUMMARY TOTALS

			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food
REMAINING BUDGET TO SPEND			(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16
ALLOCATED FUNDS:											
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,986.70	42,886.25
BUDGET SPENT:											
Working_SB	Admin Jobs	Total Funding Amount	151,057.92							151,057.92	
	Licensed Jobs	Total Funding Amount	1,678,904.69	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	6,081.85							6,081.85	
		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			172,336.90	
		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	0.00	3,030,417.51	36,958.09
REMAINING BUDGET TO SPEND			(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16

CCSD School Budget Planning Tool Essentials Guide

Student Teacher Ratio Validation (Elementary schools only):

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

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

The screenshot shows the 'SCHOOL BUDGET' form. The 'Entity' dropdown is set to '0235 Allen, DeanES'. Below the form, there is a button labeled 'View Student Teacher Ratio Validation' which is highlighted with a red box. Other buttons visible include 'Calc Total Position Costs' and 'Mass Calc'.

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

SB Home > Student Teacher Ratio Validations

Scenario Budget	Version Working_SB	Years FY21	Entity				
				ST Ratio Limit	Students	Difference	
Elementary Star 1 or 2 Schools							
Elementary Star 3 or 4 or 5 Schools							
Grade1			Elem - Star 3 or 4 or 5 - Grade 1	20.00		20.00	
Grade2			Elem - Star 3 or 4 or 5 - Grade 2	20.00		20.00	
Grade3			Elem - Star 3 or 4 or 5 - Grade 3	23.00		23.00	
Value Count				3.00	0.00	3.00	
Click SAVE to update the ratios							

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

SB Home > Student Teacher Ratio Validations

Scenario Budget | Version Working_SB | Years FY21 | Entity [Redacted]

		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	16.60	3.40
Grade2	Elem - Star 3 or 4 or 5 - Grade 2	20.00	21.80	-1.80
Grade3	Elem - Star 3 or 4 or 5 - Grade 3	23.00	23.60	-0.60
Value Count		3.00	3.00	0.00

Click SAVE to update the ratios

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

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

SCHOOL BUDGET ⓘ

SB Home > Student Teacher Ratio Validations

Scenario Budget | Version Working_SB | Years FY21 | Entity 0235 Allen, DeanES

		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	19.67	0.33
Grade2	Elem - Star 3 or 4 or 5 - Grade 2	20.00	17.50	2.50
Grade3	Elem - Star 3 or 4 or 5 - Grade 3	23.00	20.25	2.75
Value Count		3.00	3.00	0.00

Click SAVE to update the ratios

CCSD School Budget Planning Tool Essentials Guide

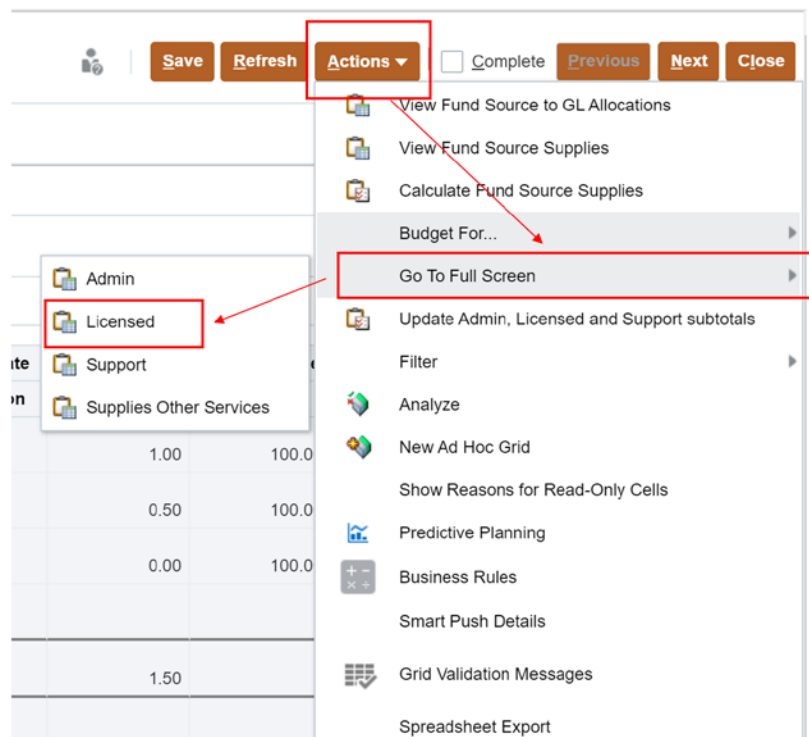
Increasing the Headcount of an Existing Position

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

Feature:

- The User cannot select a “Vacant” position since they can simply update the *Hours* (Support Professionals) or *FTE* (Licensed and Admin) of the position to increase the count and budget cost
- The Vacant position created by the Feature will use the *same funding* source allocation of the existing position
- The selected existing Position’s relevant data will be copied to the same data intersection but instead of Employee 1, or Employee 2, etc. of the existing Position, the new data will be “Vacant”.
 - Employee specific data such as EMPL_ID, Name, Hire Date will be blank for the Vacant position
 - Primary Pay Rate will use the Average Salary Rate for the Vacant position

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



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

CCSD School Budget Planning Tool Essentials Guide

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

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

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

Buttons: Data, Ad hoc, Format

Menu:

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

Sub-menu for "Budget For...":

- A New Position
- Prep Buyout - Licensed
- Add-On and Extra - Licensed
- Add-On and Extra - Support
- Job2- Support Staff
- CTT - Sub Teacher
- Increase Position Headcount**

Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percent
Assumption	Assumption	Assumption	Assumption	Gen Fund
U_325191	8/7/19		1.00	100.00
M_331715	8/7/19		1.00	100.00
M_516040	8/7/19		1.00	100.00
			1.00	
			1.00	
			1.00	
			1.00	
			1.00	100.00
			1.00	
			1.00	
			1.00	100.00

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

Launch Confirmation Message

Are you sure you want to add a vacant row to this Position?

OK Cancel

- 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

SB Home > SB Position Info Detail-Licensed Transf

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

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

Buttons: Data, Ad hoc, Format

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percent
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
CCSD LastName, FirstName EM_325191		8/7/19		1.00	100.00
CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00
CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00
Vacant		8/7/19		1.00	100.00
CCSD LastName, FirstName EM_10014323		8/7/19		1.00	
CCSD LastName, FirstName EM_303745		8/7/19		1.00	
CCSD LastName, FirstName EM_553069		8/7/19		1.00	
CCSD LastName, FirstName EM_524230		2/20/20		0.00	

CCSD School Budget Planning Tool Essentials Guide

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

The screenshot shows the 'SCHOOL BUDGET' interface. A right-click context menu is open over the 'Vacant' position row. The menu options are: Transfer Position, **Calc Total Position Costs** (highlighted with a red box), Mass Calc, Update Funding Source Allocations, Edit Position Info, Go to Licensed Summary, View Fund Source to GL Allocations, View Fund Source Supplies, Calculate Fund Source Supplies, and Budget For... The background table shows three employees (Employee 1, 2, 3) and a 'Vacant' row, all with a planned FTE of 1.00 and a Gen Fund of 100.00.

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

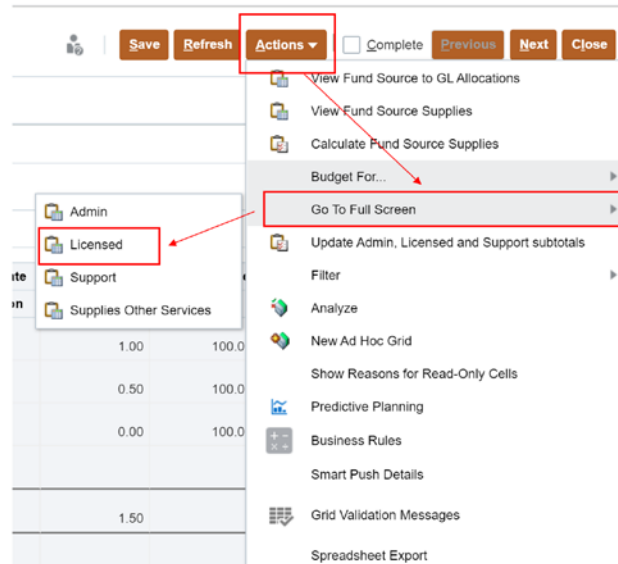
The screenshot shows the 'SCHOOL BUDGET' interface after the calculation. The 'Save' button in the top right corner is highlighted with a red box. The background table now includes employee names and IDs in the 'Assumption' column. The 'Vacant' row is highlighted in yellow, indicating it is the selected row.

Scenario	Version	Years	Entity	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percent
KDG 1 AM/1 PM1 - C1000	P_10008381_1	KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		1.00	100.00
			Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00
			Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00
			Vacant		8/7/19		1.00	100.00	

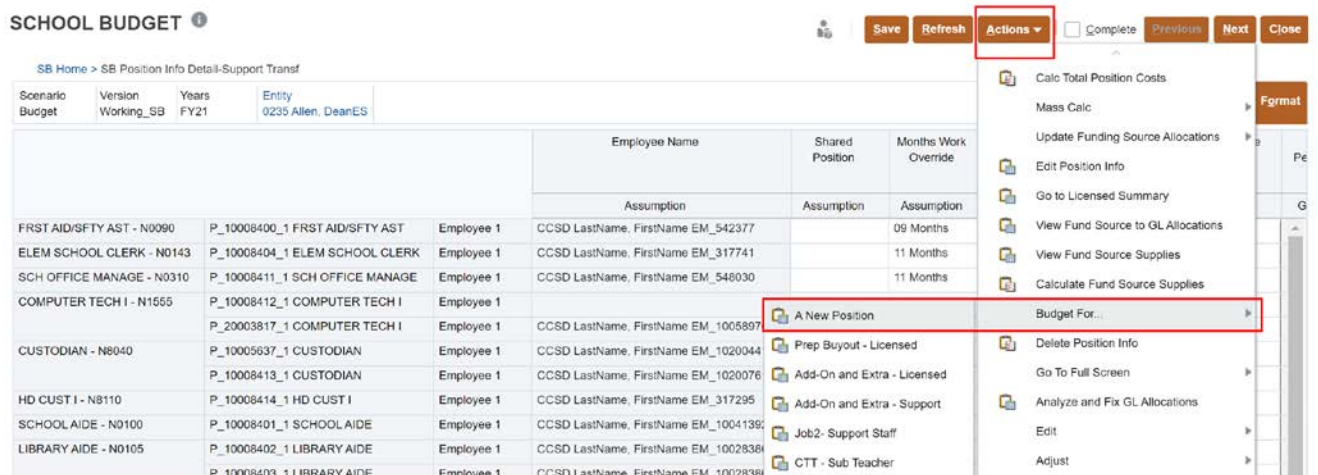
CCSD School Budget Planning Tool Essentials Guide

Adding and Adjusting Positions

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



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



CCSD School Budget Planning Tool Essentials Guide

- 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**.

SCHOOL BUDGET ⓘ

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

Period: BegBalance, Years: FY21, Scenario: Budget, Version: Working_SB, Entity: 0235 Allen, DearES, Job: PE INSTR ASST - N0179

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

Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	FS Percentage				
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Support Only-Enter #Months and Hours										

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

Select a Member

Buttons: OK, Cancel

Job: "TI INS ASST III - N0198"

Search Job

Category	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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

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

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

SCHOOL BUDGET ⓘ

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

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

Actions ▼

- Add Position
- Calc Total Position Costs
- Edit Position Info
- View Fund Src to GL Allocations
- Filter
- Sort
- Analyze
- New Ad Hoc Grid

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

NextPositionAdd

* Enter proposed number of FTE to purchase: 1

* Select FROM Job Code: "N0198"

* Enter Default as VACANT: Vacant

* Enter proposed number of FTE to purchase: 100

100% to General Fund

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

Launch **Cancel**

- 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

CCSD School Budget Planning Tool Essentials Guide

appropriate funding source column. The updated cells will show in yellow to indicate that the data in the form needs to be Saved. Click **Save** to update and remove the yellow highlight.

SCHOOL BUDGET ⓘ

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

Period BegBalance Years FY21 Scenario Budget Version Working_SB Entity 0235 Allen, DeanES Job TI INS ASST III - N0198

Employee Name Planned FTE Months Work Override Hours Per Day Override Eff Start Date Eff Stop Date

Assumption Assumption Assumption Assumption Assumption Assumption Gen Fund HOPE2 GenF SB178 Magnet Title I

Support Only-Enter #Months and Hours

New Position 6 Vacant 0.00 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**.

SCHOOL BUDGET ⓘ

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

Period BegBalance Years FY21 Scenario Budget Version Working_SB Entity 0235 Allen, DeanES Job TI INS ASST III - N0198

Employee Name Planned FTE Months Work Override Hours Per Day Override Eff Start Date Eff Stop Date

Assumption Assumption Assumption Assumption Assumption Assumption Gen Fund HOPE2 GenF SB178 Magnet Title I

Support Only-Enter #Months and Hours

New Position 6 Vacant 0.00 09 Months 6.00 100.00

Right-click menu options: Add Position, Calc Total Position Costs, Edit Position Info, View Fund Src to GL Allocations, Edit, Adjust, Supporting Detail, Change History, Lock/Unlock Cells, Filter

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

SCHOOL BUDGET ⓘ

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

Period BegBalance Years FY21 Scenario Budget Version Working_SB Entity 0235 Allen, DeanES Job TI INS ASST III - N0198

Employee Name Planned FTE Months Work Override Hours Per Day Override Eff Start Date Eff Stop Date

Assumption Assumption Assumption Assumption Assumption Assumption Gen Fund HOPE2 GenF SB178 Magnet Title I

Support Only-Enter #Months and Hours

New Position 6 Vacant 0.56 09 Months 6.00 100.00

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET

SB Home

SB Position Info Detail-Support Transf

Scenario Budget

Version Working_SB

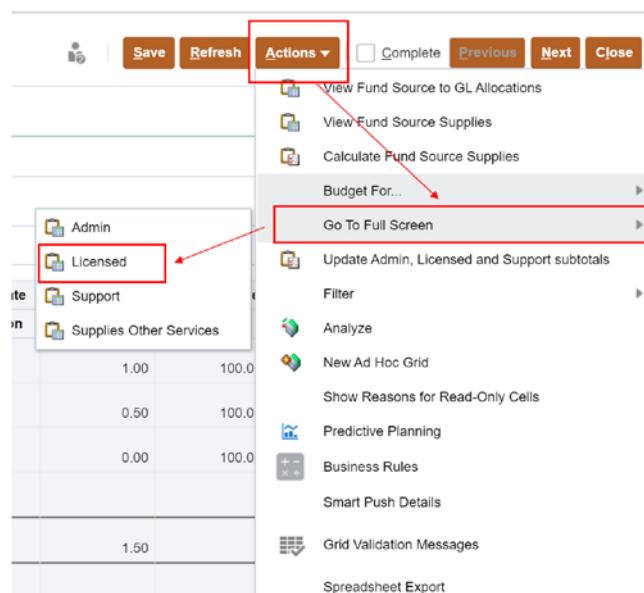
Years FY21

Entity 0235 Allen, DeanES

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)



CCSD School Budget Planning Tool Essentials Guide

- 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**.

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191
		Employee 2	CCSD LastName, FirstName EM_331715
		Employee 3	CCSD LastName, FirstName EM_516040
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323
		Employee 2	CCSD LastName, FirstName EM_303745
		Employee 3	CCSD LastName, FirstName EM_553069
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954
	New Position 5	Vacant	Vacant

Actions

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

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

SCHOOL BUDGET

SB Home > SB Position Info Detail

Scenario Budget: TI INS ASST III - N0198, Version: Working_SB, Years: FY21

Actions

- Edit Funding Source**
- Calc Total Position Costs
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter
- Sort
- Analyze

Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	Total Comp Exp	FS Percentage	Total Fund Src	FS Amount Average Cost Basis
Assumption	Assumption	Assumption	Assumption		GenF SB178	Allocation Pct	GenF SB178
			0.56	31,779.25	100.00	100.00	31,779.25
			1.00	88,205.51			88,205.51

- 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**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Support Transf > SB New Pos Edit AllJobs > SB Edit Position FSAlloc

Scenario Budget: FY21, Entity: 0235 Allen, DeanES, Job: TI INS ASST III - N0198, Position: New Position 6, Employee: Vacant

Actions

- Save**
- Refresh
- Actions
- Complete
- Previous
- Next
- Close

Employee Name	FS Percentage	Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Budget Start Date	Budget End Date
Assumption	Gen Fund	GenF Read by J	CSR	GenF SB178	GATE	Sp Ed	Assumption
Strategic Budget	Vacant	100.00				Hourly	Biweekly
				15.96	15.96	7/1/20	

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET 1

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

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

Save **Refresh** **Actions** ☐ Complete **Previous** **Next** **Close**

Data **Ad hoc** **Format**

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

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

Removing a Position

-
- The screenshot shows the 'Actions' menu in the 'Budgets' application. The 'Go To Full Screen' option is highlighted in the main menu, and the 'Licensed' option is highlighted in the left-hand sidebar menu. Red arrows indicate the path from the 'Actions' menu to the 'Go To Full Screen' option.

- SCHOOL BUDGET

Save

Refresh

Actions

Complete

Previous

Next

Close

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget

Version Working_SB

Years FY21

Entity 0235 Allen, DeanES

Data

Ad hoc

Format

			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percen
			Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		0.00	100
		Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00
		Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00
GRADE 1 - C1010	P_10008382_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 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411		8/7/19		1.00	100.00
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954		8/7/19		1.00	

CCSD School Budget Planning Tool Essentials Guide

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

The screenshot shows the 'SCHOOL BUDGET' interface. At the top, there's a navigation bar with 'SB Home' highlighted. Below it, a table lists positions. The first row is highlighted in yellow. A right-click context menu is open over the first row, with 'Calc Total Position Costs' selected. The menu also includes options like 'Transfer Position', 'Mass Calc', 'Update Funding Source Allocations', 'Edit Position Info', 'Go to Licensed Summary', 'View Fund Source to GL Allocations', 'View Fund Source Supplies', 'Calculate Fund Source Supplies', and 'Budget For...'. The background table has columns for 'Scenario', 'Version', 'Years', 'Entity', 'Position', 'Employee', 'FTE', 'FS Percent', and 'CSR'.

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

The screenshot shows the 'SCHOOL BUDGET' interface after saving. The 'SB Home' link is highlighted. The main table displays funding source percentages for various positions. The first row shows 'KDG 1 AM/1 PM1 - C1000' with a 'Gen Fund' percentage of 100.00 and a 'CSR' percentage of 0.00. The table has columns for 'Scenario', 'Version', 'Years', 'Entity', 'Position', 'Employee', 'FS Percentage', 'FS Percentage', 'Total Fund Src', and 'FS Amount Average Cost Base'.

- 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**).

The screenshot shows the 'SCHOOL BUDGET' interface with the 'Actions' menu open. The 'Go To Full Screen' option is highlighted. The menu also includes options like 'View Fund Source to GL Allocations', 'View Fund Source Supplies', 'Calculate Fund Source Supplies', 'Budget For...', 'Update Admin, Licensed and Support subtotals', 'Filter', 'Analyze', 'New Ad Hoc Grid', 'Show Reasons for Read-Only Cells', 'Predictive Planning', 'Business Rules', 'Smart Push Details', 'Grid Validation Messages', 'Spreadsheet Export', and 'Open in Smart View'. The background table has columns for 'Scenario', 'Version', 'Years', 'Entity', 'Position', 'Employee', 'FTE', 'FS Percent', and 'CSR'.

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Support Transf

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

Save Refresh Actions ▾ ☐ Complete Previous Next Close

Data Ad hoc Format

Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	Pe
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	G
SPTA II - N0162	P_10008406_1 SPTA II	Employee 1	CCSD LastName, FirstName EM_10049345	09 Months	0.00	1/19/20
		Employee 2	CCSD LastName, FirstName EM_10090528	09 Months	6.00	12/22/19
		Employee 3	CCSD LastName, FirstName EM_319789	09 Months	6.00	12/22/19
		Employee 4	CCSD LastName, FirstName EM_540930	09 Months	6.00	12/22/19
PE INSTR ASST - N0179	P_10008407_1 PE INSTR ASST	Employee 1	CCSD LastName, FirstName EM_10022402	09 Months	0.50	12/22/19
	P_10008408_1 PE INSTR ASST	Employee 1	CCSD LastName, FirstName EM_10022402	09 Months	6.00	12/22/19
INSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473	09 Months	5.00	12/22/19
	P_10008410_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473	09 Months	1.50	12/22/19
TI INS ASST III - N0198	New Position 6	Vacant	Vacant	09 Months	6.00	
FS WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1	CCSD LastName, FirstName EM_10049345	09 Months	0.00	12/22/19
SR FOOD SRVC WRKR - N5030	P_10023567_1 SR FOOD SRVC WRKR	Employee 1	CCSD LastName, FirstName EM_324401	09 Months	5.50	12/22/19
FORM TOTALS						

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

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

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Support Transf

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

Save Refresh Actions ▾ ☐ Complete Previous Next Close

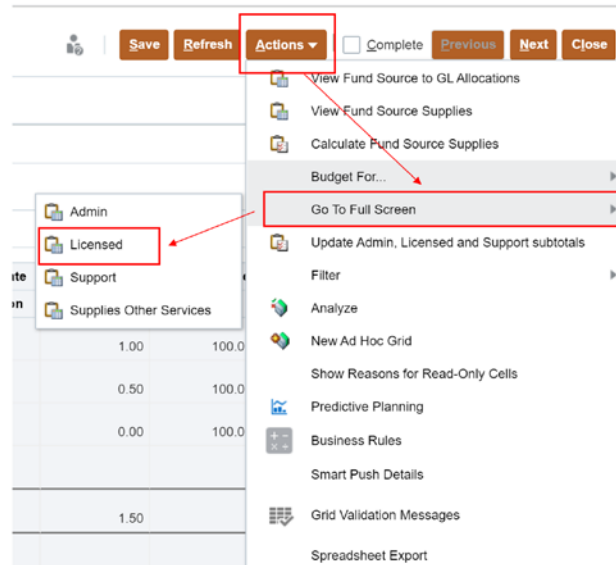
Data Ad hoc Format

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

CCSD School Budget Planning Tool Essentials Guide

Transfer to Existing Position

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



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

SCHOOL BUDGET

Scenario: Budget

Version: Working_SB

Years: FY21

User: 6235 Allen, DeanC5

Employee Name

Shared Position

Eff Start Date

Eff Stop Date

Planned FTE

FS Percentage

FS Percentage

Total Fund Src

FS Amt

Assumption

Assumption

Assumption

Assumption

Assumption

Gen Fund

CSR

Genf SB178

Gen GATE

Se Ed

Allocation Pct

Gen Fund

GRADE 1 - C1010

P_10000362_1 GRADE 1

Employee 1

CCSD LastName, FirstName EM_10014323

8/7/19

1.00

100.00

100.00

Employee 2

CCSD LastName, FirstName EM_303748

8/7/19

1.00

100.00

100.00

Employee 3

CCSD LastName, FirstName EM_553099

8/7/19

1.00

100.00

100.00

Employee 4

CCSD LastName, FirstName EM_524230

2/20/20

1.00

100.00

100.00

New Position 8

Vacant

Vacant

1.00

100.00

GRADE 2 - C1020

P_10000363_1 GRADE 2

Employee 1

CCSD LastName, FirstName EM_312411

8/7/19

1.00

100.00

100.00

88,205.1

P_10000364_1 GRADE 2

Employee 1

CCSD LastName, FirstName EM_520954

8/7/19

1.00

100.00

100.00

New Position 5

Vacant

Vacant

1.00

100.00

100.00

ARL-ELEM, 2ND - C1025

P_10000365_1 ARL-ELEM, 2ND

Employee 1

CCSD LastName, FirstName EM_10064404

8/7/19

1.00

100.00

100.00

88,205.1

GRADE 3 - C1030

P_10000366_1 GRADE 3

Employee 1

CCSD LastName, FirstName EM_10034305

7/1/20

1.00

100.00

100.00

88,205.1

Employee 2

CCSD LastName, FirstName EM_502600

8/7/19

1.00

100.00

100.00

88,205.1

Employee 3

CCSD LastName, FirstName EM_524230

2/20/20

1.00

100.00

100.00

88,205.1

GRADE 4 - C1040

P_10000367_1 GRADE 4

Employee 1

CCSD LastName, FirstName EM_10109911

7/1/20

1.00

100.00

100.00

88,205.1

Employee 2

CCSD LastName, FirstName EM_1016074

8/7/19

1.00

100.00

100.00


88,205.1

Transfer From 1st Grade CSR Position 10008386

Transfer To 3rd General Fund Position 10008386

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET 

SB Home > SB Position Info Detail-Licensed Transf


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

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB179	Gen GATE	
Employee 1		8/7/19		1.00	100.00				
Employee 2		8/7/19		1.00	100.00				
Employee 3		8/7/19		1.00	100.00				
Employee 4		2/20/20		1.00	100.00				
Vacant				1.00	100.00				
Employee 1		8/7/19		1.00	100.00				
Employee 1		8/7/19		1.00	100.00				
Vacant				1.00			100.00		
Employee 1		8/7/19		1.00	100.00				
Employee 1		7/1/20		1.00	100.00				
Employee 2		8/7/19		1.00	100.00				
Employee 3		2/20/20		1.00	100.00				
Employee 1		7/1/20		1.00	100.00				
Employee 2		8/7/19		1.00	100.00				
Vacant		7/1/20		1.00	100.00				

Transfer Position

- Calc Total Position Costs
- Mass Calc
- Update Funding Source Allocations
- Edit Position Info
- Go to Licensed Summary
- View Fund Source to GL Allocations
- View Fund Source Supplies
- Calculate Fund Source Supplies
- Budget For...
- Delete Position Info
- Go To Full Screen
- Edit Position Detail
- Analyze and Fix GL Allocations

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

Launch Confirmation Message 

Please confirm you have Job, Position and Employee# to make the transfer To and From. In the To Employee# field type the next number in line i.e. the position you are transferring to has employee 1 and 2, enter employee 3. TIP: Use Snipping Tool if needed

OK **Cancel**

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

Transfer Position

 **Launch** **Cancel**

* Select FROM Employee "Employee 1" 

* Select FROM Job Code "C1010" 

* Select FROM Position "P_10008382_1" 

* Select TO Employee "Employee 4" 

* Select TO Position "P_10008386_1" 

* Select TO JOB "C1030" 

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").

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SS Home > SB Position Info Detail-Licensed Transf

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

		Employee Name	Assigned Position Number	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage		FS Percentage		Total Fund Src
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17B	Gen GATE	Sp Ed
KDG 1 AM1 PM1 - C1000	P_1000381_1 KDG 1 AM1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		1.00	100.00				100.00
		Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00				100.00
		Employee 3	CCSD LastName, FirstName EM_510040		8/7/19		1.00	100.00				100.00
		Vacant			8/7/19		1.00	100.00				100.00
GRADE 1 - C1010	P_1000382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_1001425	P_1000382_1	8/7/19		0.00	100.00				100.00
		Employee 2	CCSD LastName, FirstName EM_303749		8/7/19		1.00	100.00				100.00
		Employee 3	CCSD LastName, FirstName EM_563069		8/7/19		1.00	100.00				100.00
		Employee 4	CCSD LastName, FirstName EM_524230		2/29/20		1.00	100.00				100.00
	New Position 8	Vacant			8/7/19		1.00	100.00				100.00
GRADE 2 - C1020	P_1000383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_310411		8/7/19		1.00	100.00				100.00
	P_1000384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520854		8/7/19		1.00	100.00				100.00
	New Position 5	Vacant			8/7/19		1.00	100.00				100.00
ARL-ELEM 2ND - C1025	P_1000385_1 ARL-ELEM 2ND	Employee 1	CCSD LastName, FirstName EM_1005404		8/7/19		1.00	100.00		100.00		100.00
GRADE 3 - C1030	P_1000386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10014305		7/1/20		1.00	100.00				100.00
		Employee 2	CCSD LastName, FirstName EM_560800		8/7/19		1.00	100.00				100.00
		Employee 3	CCSD LastName, FirstName EM_524230		2/29/20		1.00	100.00				100.00
		Employee 4	CCSD LastName, FirstName EM_1001425	P_1000382_1	8/7/19		1.00	100.00				100.00

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

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

SCHOOL BUDGET

SS Home > SB Position Info Detail-Licensed Transf

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

		Employee Name	Assigned Position Number	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage		FS Percentage		Total Fund Src
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17B	Gen GATE	Sp Ed
KDG 1 AM1 PM1 - C1000	P_1000381_1 KDG 1 AM1 PM	Employee 1			8/7/19		1.00	100.00				100.00
		Employee 2			8/7/19		1.00	100.00				100.00
		Employee 3			8/7/19		1.00	100.00				100.00
		Vacant			8/7/19		1.00	100.00				100.00
GRADE 1 - C1010	P_1000382_1 GRADE 1	Employee 1	P_1000382_1		8/7/19		0.00	100.00				100.00

- 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

SS Home > SB Position Info Detail-Licensed Transf

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

SaveRefreshActions

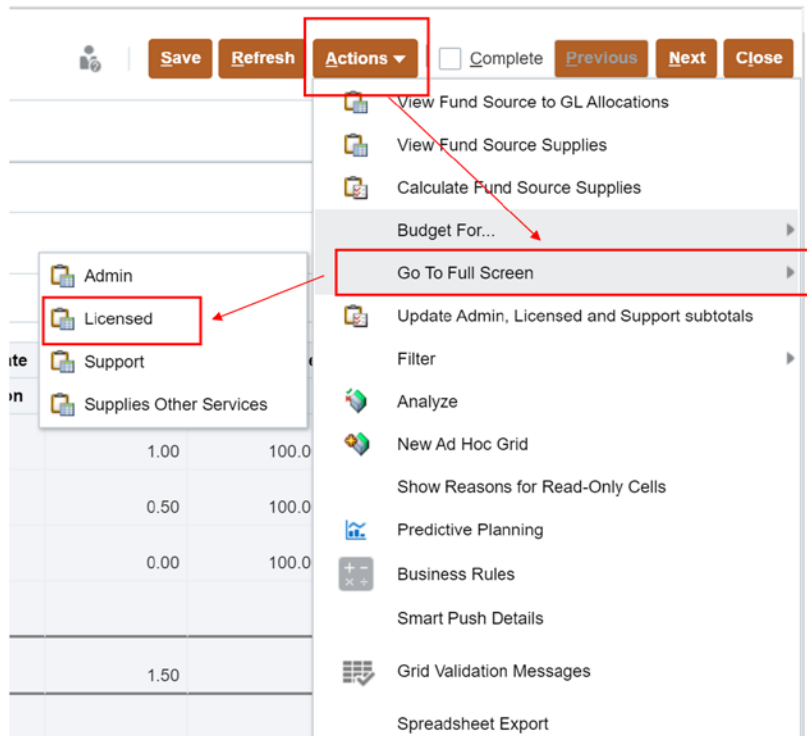
ComplexPrintClose

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES			Assigned Position Number	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage		FS Percentage		Total Fund Src	FS Amount Average Cost Basis		
								Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17B	Gen GATE	Sp Ed	Allocation Pct	Gen Fund	CSR
KDG 1 AM1 PM1 - C1000	P_1000381_1 KDG 1 AM1 PM	Employee 1			8/7/19		1.00	100.00						100.00	88,205.51			
		Employee 2			8/7/19		1.00	100.00						100.00	88,205.51			
		Employee 3			8/7/19		1.00	100.00						100.00	88,205.51			
		Vacant			8/7/19		1.00	100.00						100.00	88,205.51			
GRADE 1 - C1010	P_1000382_1 GRADE 1	Employee 1	P_1000382_1		8/7/19		0.00	100.00						100.00		8.00		
		Employee 2			8/7/19		1.00	100.00						100.00	88,205.51			
		Employee 3			8/7/19		1.00	100.00						100.00	88,205.51			
		Employee 4			2/29/20		1.00	100.00						100.00	88,205.51			
		Vacant					1.00	100.00						100.00	88,205.51			
GRADE 2 - C1020	P_1000383_1 GRADE 2	Employee 1			8/7/19		1.00	100.00						100.00	88,205.51			
		Employee 1			8/7/19		1.00	100.00						100.00	88,205.51			
		Vacant					1.00	100.00						100.00	88,205.51			
ARL-ELEM 2ND - C1025	P_1000384_1 ARL-ELEM 2ND	Employee 1			8/7/19		1.00	100.00		100.00				100.00	88,205.51			
GRADE 3 - C1030	P_1000386_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			2/29/20		1.00	100.00						100.00	88,205.51			
		Employee 4	P_1000382_1		8/7/19		1.00	100.00						100.00	88,205.51			

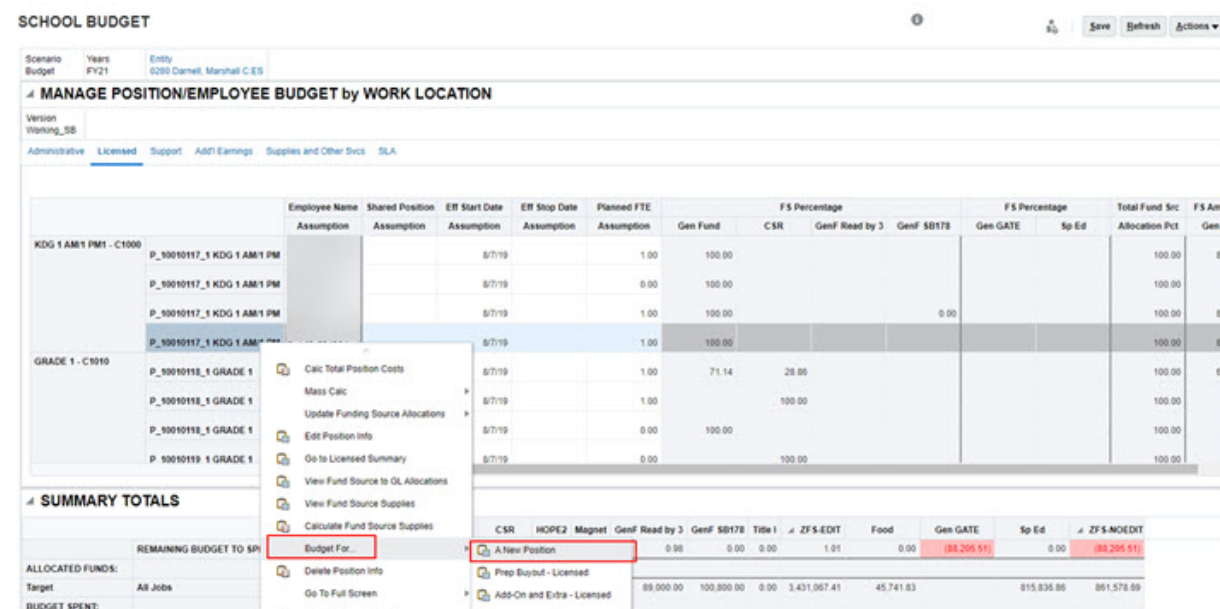
CCSD School Budget Planning Tool Essentials Guide

Transfer to New Vacant Position

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



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



CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Add Position

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

There are no valid rows of data for this form.

Actions ▾

- Add Position
- Calc Total Position Costs
- Edit Position Info
- View Fund Src to OL Allocations
- Filter
- Analyze
- New Ad Hoc Grid
- Show Reasons for Read-Only Cells

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

NextPositionAdd

Launch **Cancel**

* Enter proposed number of FTE to purchase

* Select FROM Job Code

* Enter Default as VACANT

* New Position Default is 100% to General Fund

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

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

SCHOOL BUDGET

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

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

Save **Refresh** **Actions** ▾ ☐ Complete **Previous** **Next** **Close**

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info

Period: BegBalance, Years: FY21

Support Only-Enter #Months

New Position 5

Menu options: Add Position, **Calc Total Position Costs**, Edit Position Info, View Fund Src to GL Allocations, Edit, Adjust, Supporting Detail, Change History, Lock/Unlock Cells, Filter

Job: KDG 1 AM/1 PM1 - C1000

Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	FS Percentage	Gen Fund	GenF Read by 3	CSR	GenF SB175	GATE
Assumption	Assumption	Assumption	Assumption		50.00			50.00	

- 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:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario: Budget, Version: Working_SB, Years: FY21, Entry: 0200 Daniel, Marshall C ES

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	FS Percentage	Total Fund (\$)
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3
KDG 1 AM1 PM1 - C1000	P_10810117_1 KDG 1 AM1 PM	Employee 1	9/7/19	1.00	100.00		10
		Employee 2	9/7/19	0.00	100.00		10
		Employee 3	9/7/19	1.00	100.00	5.00	10
		Employee 4	9/7/19	1.00	100.00		10
		vacant		1.00	50.00	50.00	10
GRADE 1 - C1010	P_10810118_1 GRADE 1	Employee 1	9/7/19	1.00	11.14	28.00	10
		Employee 2	9/7/19	1.00	100.00		10
		Employee 3	9/7/19	0.00	100.00		10
		Employee 2	9/7/19	1.00	100.00		10
GRADE 2 - C1020	P_10810120_1 GRADE 2	Employee 1	7/31/19	1.00	100.00		10
		Employee 2	9/7/19	1.00	100.00		10
		Employee 1	9/7/19	1.00	100.00		10
		Employee 2	9/7/19	1.00	100.00		10

Transfer From General Funded Position 30610137

Transfer To 50% GenFund / 50% SB175 funded position

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C.ES																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																														
-----------------	--------------------	------------	------------------------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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

Launch Confirmation Message

Please confirm you have Job, Position and Employee# to make the transfer To and From. In the To Employee# field type the next number in line i.e. the position you are transferring to has employee 1 and 2, enter employee 3. TIP: Use Snipping Tool if needed

OK

Cancel

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

Transfer Position

* Select FROM Employee

Employee 4

* Select FROM Job Code

C1000

* Select FROM Position

P_10010117_1

* Select TO Employee

Employee 2

* Select TO Position

New Position 2

* Select TO JOB

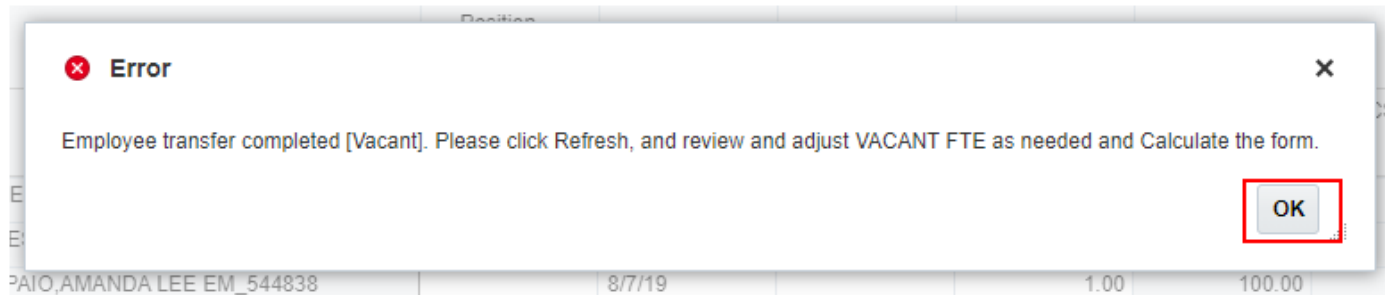
C1000

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").

* Click [here](#) to return to the Table of Contents.

CCSD School Budget Planning Tool Essentials Guide

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



- Click **Refresh**:

SCHOOL BUDGET

SB Home • SB Position Info Detail-Licensed Transf

Scenario: Budget, Version: Working_SB, Years: FY21, Entity: 0200 District, Marshall C ES

Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage				FS Percentage		Total Fund Svc
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read By 3	GenF SB179	Gen GATE	Sp Ed	Allocation Pct
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1		8/7/19	1.00	100.00					10.00
		Employee 2		8/7/19	0.00	100.00					10.00
		Employee 3		8/7/19	1.00	100.00			0.00		10.00
		Employee 4		8/7/19	1.00	100.00					10.00
New Position 2	Vacant				1.00	50.00		50.00			10.00

The transferred employee rows will be displayed in yellow:

SCHOOL BUDGET

SB Home • SB Position Info Detail-Licensed Transf

Scenario: Budget, Version: Working_SB, Years: FY21, Entity: 0200 District, Marshall C ES

Employee Name	Assigned Position Number	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage				FS Percentage	
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read By 3	GenF SB179	Gen GATE	Sp Ed
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1		8/7/19	1.00	100.00					
		Employee 2		8/7/19	0.00	100.00					
		Employee 3		8/7/19	1.00	100.00			0.00		
		Employee 4		8/7/19	1.00	100.00					
New Position 2	Employee 2	P_10010117_1	8/7/19		1.00	50.00		50.00			

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget Version Working_SB Years FY21 Entity 0200 Darrell, Marshall C.E.S.

			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1				8/7/19		1.00	100.00			
		Employee 2				8/7/19		0.00	100.00			
		Employee 3				8/7/19		1.00	100.00			0.00
		Employee 4				8/7/19		0.00	100.00			
		New Position 2	Employee 2	P_10010117_1		8/7/19		1.00	50.00			50.00

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

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

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget Version Working_SB Years FY21 Entity 0200 Darrell, Marshall C.E.S.

			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178
KDG 1 AM/1 PM1 - C1000	P_10010117_1 KDG 1 AM/1 PM	Employee 1				8/7/19		1.00	100.00			
		Employee 2				8/7/19		0.00	100.00			
		Employee 3				8/7/19		1.00	100.00			0.00
		Employee 4				8/7/19		0.00	100.00			
		New Position 2	Employee 2	P_10010117_1		8/7/19		0.00	50.00			50.00

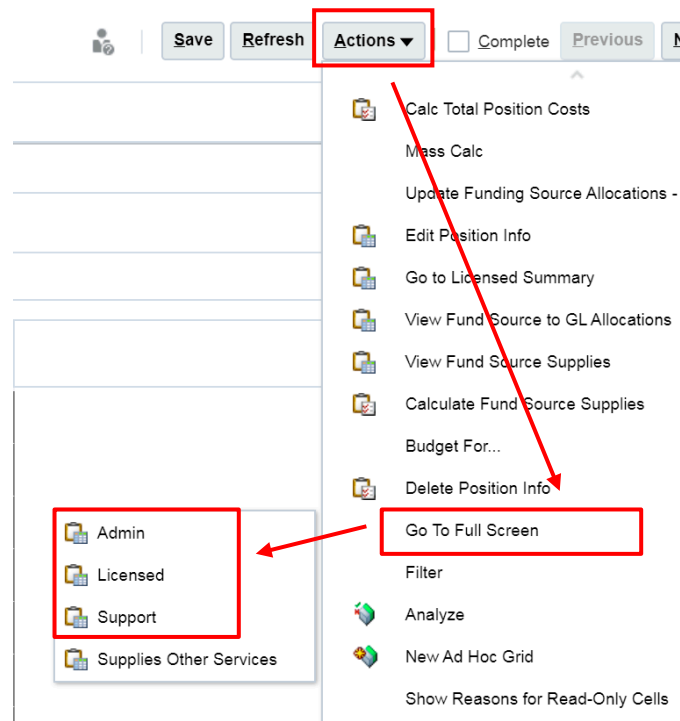
CCSD School Budget Planning Tool Essentials Guide

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

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



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



CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

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

Scenario

Version

Years

Entry

Budget

Working_SB

FY21

0411 Hoggard, M

Transfer Position

Calc Total Position Costs

Mass Calc

Update Funding Source Allocations

Edit Position Info

Go to Licensed Summary

View Fund Source to GL Allocations

View Fund Source Supplies

Calculate Fund Source Supplies

Budget For...

Delete Position Info

Go To Full Screen

View Edit Position Totals

Edit

Adjust

Supporting Detail

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
			8/7/19		1.0
			8/7/19		1.0
			9/9/19		1.0
			8/7/19		1.0
			8/7/19		1.0
			8/7/19		1.0
			8/7/19		1.0
			8/7/19		1.0
			8/7/19		1.0
	P_10014581_1		8/7/19		1.0
			8/7/19		1.0
			8/7/19		1.0

RBG3 LEARNING STR - C8112

P_10014580_1 RBG3 LEAR

LRN STRT TTL1 ELE - C8114

P_10014581_1 LRN STRT TTL1 ELE

Employee 1

P_10014581_1

8/7/19

0.0

Licensed Jobs

Total All Positions

Total All Employees

31.0

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

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

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

Position Information Detail

Position: P_10014581_1 LRN STRT TTL1 ELE Employee: Employee 1

Item	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual Base Salary	Calculated Average Base Salary	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Position	Multi Job	Total Employee
Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Salary	Average Base Salary	Assumption	Assumption	Assumption	Assumption	
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary	P_10014581_1	No	0.00

Compensation Monthly Spread Detail

Version: Working_SB Position: P_10014581_1 Employee: Employee 1

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

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

SCHOOL BUDGET

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

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

Position Information Detail

Position: P_10014581_1 LRN STRT TTL1 ELE Employee: Employee 1

Item	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual Base Salary	Calculated Average Base Salary	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Position	Multi Job	Total Employee
Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Salary	Average Base Salary	Assumption	Assumption	Assumption	Assumption	
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary	P_10014581_1	No	0.00

Compensation Monthly Spread Detail

Version: Working_SB Position: P_10014581_1 Employee: Employee 1

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

Right-click context menu options:

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

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

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

Position Information Detail

Position: P_10014581_1 LRN STRT TTL1 ELE Employee: Employee 1

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

Compensation Monthly Spread Detail

Version: Working_SB Position: P_10014581_1 Employee: Employee 1

	YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Basic Salary Expense-Actual Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Expense-Actual Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL COMPENSATION EXPENSE-ACTUAL BASIS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget: Working_SB FY21 Entity: 0411 Hoggard, MabelES (Magnet) (Pr)

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1	8/7/19		1.0
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1	8/7/19		1.0
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1	9/9/19		1.0
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1	8/7/19		1.0
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1	8/7/19		1.0
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1	8/7/19		1.0
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1	8/7/19		1.0
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1	8/7/19		1.0
		Employee 2	8/7/19		1.0
		Employee 3	8/7/19		1.0
		Employee 4	8/7/19		1.0
RBQ3 LEARNING STR - C8112	P_10014580_1 RBQ3 LEARNING STR	Employee 1	8/7/19		1.0
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1	8/7/19		1.0
Licensed Jobs	Total All Positions	Total All Employees			31.0

Original Position Number Transferred From

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0411 Hoggard, MabelES (Magnet) (Pr
-----------------	--------------------	------------	---

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


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

Save Refresh Actions

☐ Complete
 Previous Next Close

Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		9/9/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		1.0
		8/7/19		0.0
				31.0

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



Launch Confirmation Message ✕

Are you sure you want to delete?

OK **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

Launch

Cancel

* Select FROM Employee

Employee 4

* Select FROM Position

P_10014579_1

* Select FROM Job Code

C8111

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home • SB Position Info Detail-Licensed Transf

Save Refresh Actions Complete Download Print Close

Scenario: Budget Version: Working_SB Years: FY21 Entity: SA11 Huggard, Mabel S (Magnet) (P)

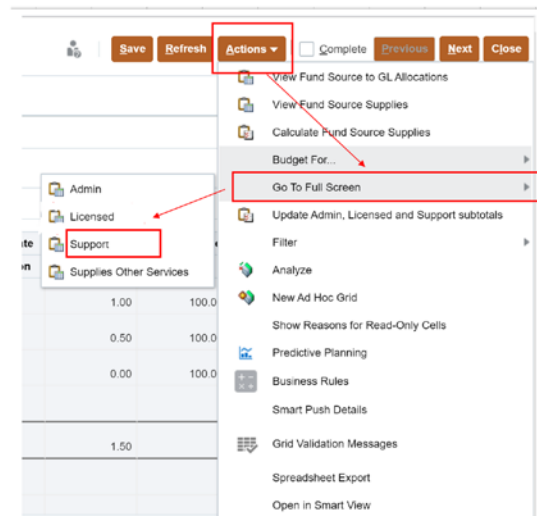
Data Add Row Format

			Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
		Employee 2			8/7/19		1.00	100.0
		Employee 3			8/7/19		1.00	100.0
GRADE 5 - C1050	P_10014570_1 GRADE 5	Employee 1			8/7/19		1.00	100.0
		Employee 2			7/31/19		1.00	100.0
		Employee 3			8/7/19		1.00	100.0
ART, ELEM - C1100	P_10014571_1 ART, ELEM	Employee 1			8/7/19		1.00	100.0
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1			8/7/19		1.00	100.0
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1			8/7/19		1.00	100.0
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1			9/9/19		1.00	
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1			8/7/19		1.00	
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1			8/7/19		1.00	
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1			8/7/19		1.00	100.0
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1			8/7/19		1.00	100.0
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1			8/7/19		1.00	100.0
		Employee 2			8/7/19		1.00	100.0
		Employee 3			8/7/19		1.00	100.0
RBG3 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR	Employee 1			8/7/19		1.00	
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			8/7/19		0.00	7.0
Licensed Jobs	Total All Positions	Total All Employees					31.00	

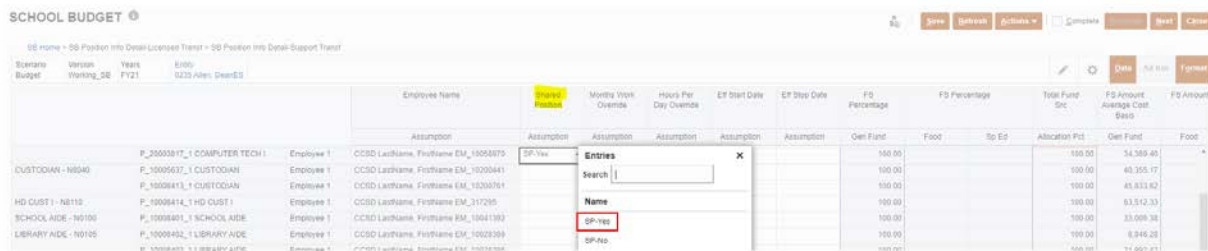
CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Shared Position

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



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



CCSD School Budget Planning Tool Essentials Guide

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.

SCHOOL BUDGET

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

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

Employee Name	Shared Position	Months Work Override	Hours Per Day Override	EF Start Date	EF Stop Date	F/S Percentage	F/S Percentage	Total Fund Src	F/S Amount Average Cost Basis	F/S Amount
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund
CUSTODIAN - N0040	P_20003817_1 COMPUTER TECH I	Employee 1	CCSD LastName, Firstname EM_10050970	SP-Yes	10 Months	4.00	7/1/20	100.00	100.00	20,163.06
	P_10005637_1 CUSTODIAN	Employee 1	CCSD LastName, Firstname EM_10200441		12 Months	5.00	4/8/20	100.00	100.00	40,355.17
	P_10008413_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 - N0110	P_10008414_1 HD CUST I	Employee 1	CCSD LastName, Firstname EM_317295		12 Months	8.00	12/22/19	100.00	100.00	63,512.33

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

SCHOOL BUDGET

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

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

Employee Name	Shared Position	Months Work Override	Hours Per Day Override	EF Start Date	EF Stop Date	F/S Percentage	F/S Percentage	Total Fund Src	F/S Amount Average Cost Basis	F/S Amount
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund
CUSTODIAN - N0040	P_20003817_1 COMPUTER TECH I	Employee 1	CCSD LastName, Firstname EM_10050970	SP-Yes	10 Months	4.00	7/1/20	100.00	100.00	20,163.06
	P_10005637_1 CUSTODIAN	Employee 1	CCSD LastName, Firstname EM_10200441		12 Months	5.00	4/8/20	100.00	100.00	40,355.17
	P_10008413_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 - N0110	P_10008414_1 HD CUST I	Employee 1	CCSD LastName, Firstname EM_317295		12 Months	8.00	12/22/19	100.00	100.00	63,512.33
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	Employee 1	CCSD LastName, Firstname EM_10041392		10 Months	8.00	3/11/20	100.00	100.00	33,006.38
LIBRARY AIDE - N0105	P_10008402_1 LIBRARY AIDE	Employee 1	CCSD LastName, Firstname EM_10028385		09 Months	2.50	12/22/19	100.00	100.00	8,848.28
CLERK TYPIST I - N0119	P_10008403_1 CLERK TYPIST I	Employee 1	CCSD LastName, Firstname EM_10028386		09 Months	4.10	12/22/19	100.00	100.00	21,992.43
SPTA II - N0162	P_10008404_1 SPTA II	Employee 1	CCSD LastName, Firstname EM_542377		09 Months	2.00	12/22/19	100.00	100.00	
	P_10008405_1 SPTA II	Employee 1	CCSD LastName, Firstname 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.

CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Prep Buy Out

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

The screenshot shows the 'SCHOOL BUDGET' form. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. The 'Actions' menu is open, showing options like 'View Fund Source to GL Allocations', 'View Fund Source Supplies', 'Calculate Fund Source Supplies', 'Prep Buyout - Licensed', 'Add-On and Extra - Licensed', and 'Add-On and Extra - Support'. The 'Prep Buyout - Licensed' option is highlighted. Below the menu, there is a table with columns for 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', and 'FS Percentage'. The table contains one row for 'ELE PRINC (9 MOS) - U7000' with a planned FTE of 1.00 and FS Percentage of 100.0. Below the table is a 'SUMMARY TOTALS' section.

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**.

The screenshot shows the 'SB PrepBuy-Mult' form. On the left, there is a list of positions. The position 'P_10008381_1 KDG 1 AM/1 PM' is selected. A right-click menu is open over this position, showing options like 'Edit Prep Buy Details', 'View Prep Buy and Fringe', 'View Prep Buy GL Code String', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', 'Lock/Unlock Cells', 'Filter', 'Sort', 'Analyze', 'New Ad Hoc Grid', 'Show Reasons for Read-Only Cells', 'Predictive Planning', 'Business Rules', and 'Smart Push Details'. The 'Edit Prep Buy Details' option is highlighted. On the right, there is a table with columns for 'No of Preps', 'Prep Buy Days', 'Block Schedule', 'Prep Buy Note', 'FS Amount Prep Buy', 'FS Percentage-Prep Buy', and 'Ph'. The table contains one row for 'P_10008381_1 KDG 1 AM/1 PM' with a prep buy note of 'Assumption' and a prep buy amount of 'Gen Fund'.

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

SB Home > SB PrepBuy-Mult > SB PrepBuy

Scenario Budget: FY21 Entity: 0235 Allen, DeanES Job: KDG 1 AM/1 PM1 - C1000 Employee: Employee 1 Position: P_10006361_1 KDG 1 AM/1 PM

Buttons: Save Refresh Actions Complete Previous Next Close

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

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

SCHOOL BUDGET ⓘ

SB Home > **SB PrepBuy-Mult** > SB PrepBuy

Scenario Budget: FY21 Entity: 0235 Allen, DeanES Job: KDG 1 AM/1 PM1 - C1000 Employee: Employee 1 Position: P_10006361_1 KDG 1 AM/1 PM

Buttons: Save Refresh Actions Complete Previous Next Close

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ ☐ Complete Previous Next Close

SB Home > SB PrepBuy-Mult

Scenario Budget Years FY21 Version Working_SB Entity 0235 Allen, DeanES

Data Ad hoc Format

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	U C
Enter # of Prep Buys and Prep Days:							
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_325191	1.00	183.00	purchasing a prep period for the school year	7,065.91	100.00
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_331715					
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_516040					

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ ☐ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

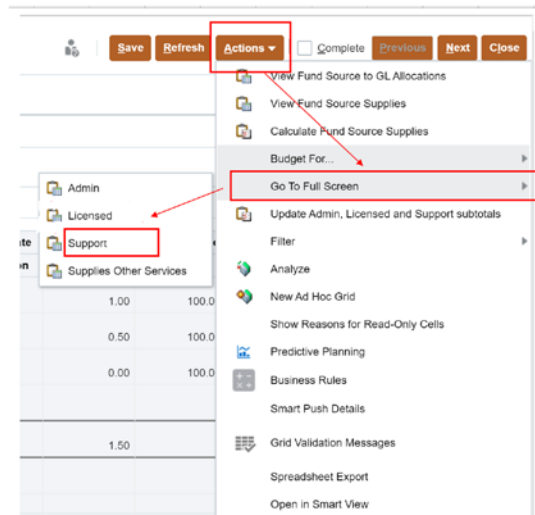
Administrative Licensed Support **Add'l Earnings** Supplies and Other Svcs SLA

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
P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,		2,254.28
			708.57
GRADE 2 - C1020	P_10008383_1 GRADE 2	CCSD LastName,	7,597.02
GRADE 4 - C1040	P_10008387_1 GRADE 4	CCSD LastName,	
			3,827.37
			586.78
LICENSED ADDITIONAL EARNINGS TOTAL			
		14,862.93	6,081.65
			1,297.35

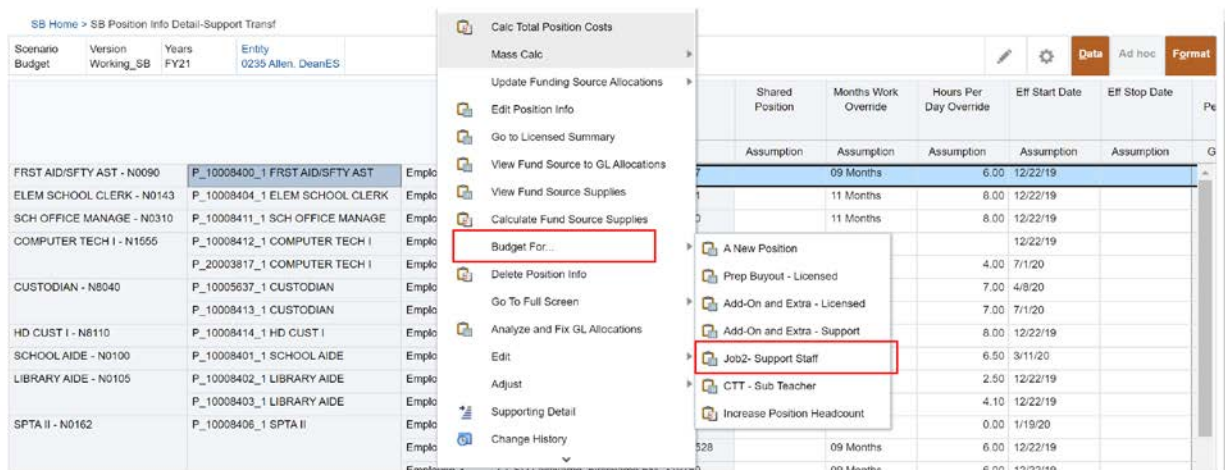
CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Job 2

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

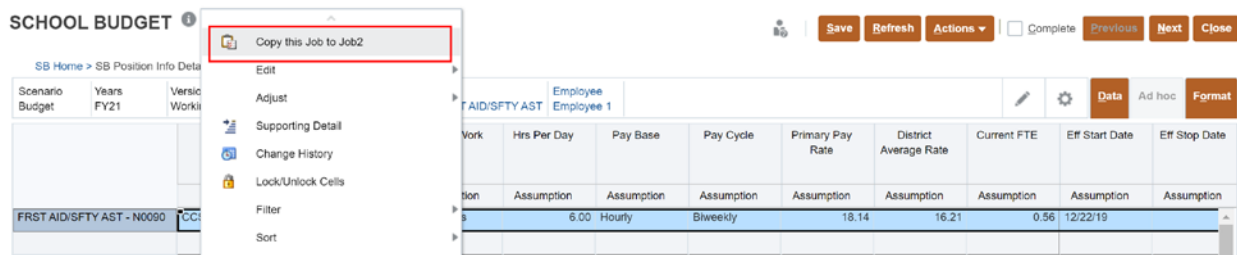


2. Find the desired employee from the Support employee grid and **right-click** on their position number. From the menu that appears, click **Budget for...**, and select **Job2 – Support Professional**.



CCSD School Budget Planning Tool Essentials Guide

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



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

Launch Confirmation Message

Select Job2 to proceed



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

Copy Job1 to Job2

The screenshot shows the 'Copy Job1 to Job2' window. It has a title bar with a 'Launch' button and a 'Cancel' button. Below the title bar, there are four selection fields, each with a 'Member Selector' icon (a small icon of two people) to its right. The fields are: '* Select FROM Employee' with value 'Employee 1', '* Select FROM Job Code' with value 'N0090', '* Select TO JOB' with value 'N0090', and '* Select Year' with value 'FY21'. The 'Member Selector' icon next to the '* Select TO JOB' field is highlighted with a red box.

CCSD School Budget Planning Tool Essentials Guide

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

Select a Member

Job
"ELEM SCHOOL CLERK - N0143"

Search Job

Total All Jobs

All Jobs

Admin Jobs

Licensed Jobs

Support Jobs

Police Jobs

Police Admin Association

Strategic Jobs

DFLT

☒ **ELEM SCHOOL CLERK - N0143**

REGISTRAR I - N0145

REGISTRAR II - N0146

SCH OFFICE MANAGE - N0310

ADMIN SCH SEC - N0320

COMPUTER TECH I - N1555

COMP TECH II - N1556

COMP TECH III - N1557

CUSTODIAN - N8040

CUSTODIAL LEAD - N8100

Members

Job > Total All Jobs > Support Jobs > ELEM SCHOOL CLERK - N0143

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

Copy Job1 to Job2

* Select FROM Employee "Employee 1"

* Select FROM Job Code "N0090"

* Select TO JOB **N0143**

* Select FROM Position "P_10008400_1"

* Select Work Location "WL_0235"

* Select Year "FY21"

Launch **Cancel**

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

Information

Copy Job1 to Job2 was successful.

OK

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

Scenario: Budget, Version: Working_SB, Years: FY21, Entity: 0235 Allen, DeanES, Position: P_10008400_1 FRST AID/SFTY AST, Employee: Employee 1

	Employee Name	Months Work	Hrs Per Day	Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Current FTE	Eff Start Date	Eff Stop Date
FRST AID/SFTY AST - N0090	CCSD LastName, FirstName EM_542377	09 Months	6.00	Hourly	Biweekly	18.14	16.21	0.56	12/22/19	
ELEM SCHOOL CLERK - N0143	CCSD LastName, FirstName EM_542377	09 Months	6.00	Hourly	Biweekly	18.14			12/22/19	

- 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 ⓘ

SB Home > SB Position Info Detail-Support Transf

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

	Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date
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_10008404_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377	09 Months	6.00	12/22/19
	P_10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName, FirstName EM_317741	11 Months	8.00	12/22/19
SCH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE MANAGE	Employee 1	CCSD LastName, FirstName EM_548030	11 Months	8.00	12/22/19

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

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Support Transf

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

	Employee Name	Assumption	Assumption
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377
ELEM SCHOOL CLERK - N0143	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377

Calc Admin Positions

Calc Licensed Positions

Calc Support Positions

Calc Total Position Costs

Mass Calc

Update Funding Source Allocations

Edit Position Info

Go to Licensed Summary

View Fund Source to GL Allocations

View Fund Source Supplies

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

Save

Refresh

Actions

Complete

Previous

Next

Close

SB Home > SB Position Info Detail-Support Transf

Scenario Budget

Version Working_SB

Years FY21

Entity 0295 Allen, DeanES

Data

Ad hoc

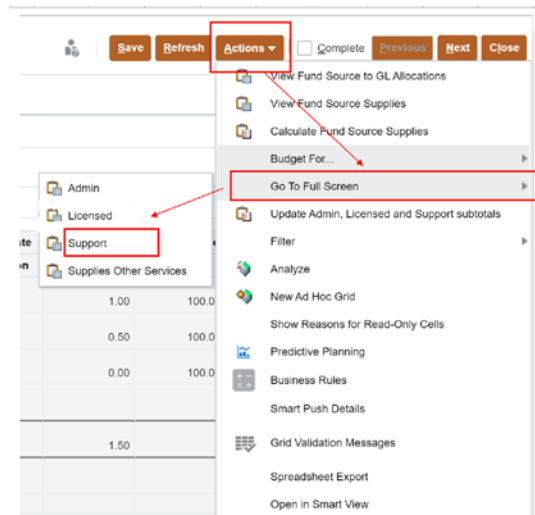
Format

				Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	
					Assumption	Assumption		Assumption		
FRST AID/SFTY AST - N0090	P_10008400_1	FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	6.00	12/22/19		
ELEM SCHOOL CLERK - N0143	P_10008400_1	FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	2.00	12/22/19		

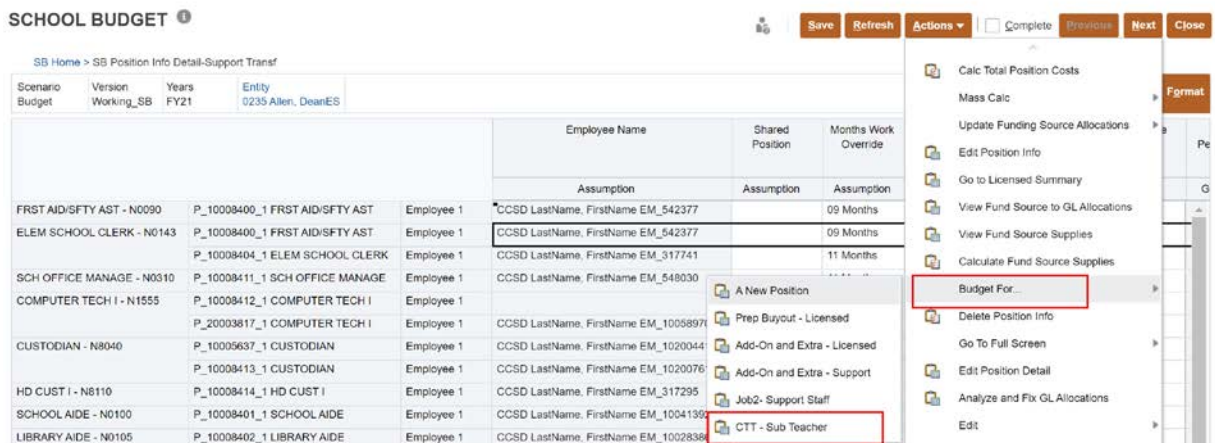
CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Certified Teacher Tutor (CTT)

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



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



CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

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

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

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

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

SCHOOL BUDGET ⓘ

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

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

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

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

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

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Support Transf

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

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

				Eff Start Date	Eff Stop Date	FS Percentage	FS Percentage		Total Fund Src	FS Amount Average Cost Basis	FS Amount Ac
							Gen Fund	Food			
INSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	12/22/19			100.00		100.00	100.00	5,231.18	
TI INS ASST III - N0198	New Position 12	Vacant	12/22/19			100.00		100.00	100.00	31,779.25	
FS WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1	12/22/19				100.00	100.00	100.00		
SR FOOD SRVC WRKR - N5030	P_10023567_1 SR FOOD SRVC WRKR	Employee 1	12/22/19				100.00	100.00	100.00		36.95
PARA PRO - CTT - N9909	No Position	No Employees				100.00		100.00	100.00	39,916.50	
FORM TOTALS						1,000.00	100.00	100.00	1,000.00	471,464.32	36.95

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

CCSD School Budget Planning Tool Essentials Guide

Budgeting for Licensed Add-On or Extra Time

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

The screenshot shows the 'SCHOOL BUDGET' interface. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these, there are fields for 'Scenario Budget', 'Years FY21', and 'Entity 0235 Allen, DeanES'. The main section is titled 'MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION'. It includes a 'Version Working_SB' field and a tabbed interface with 'Administrative', 'Licensed', 'Support', 'Add'l Earnings', 'Supplies and Other Svcs', and 'SLA'. The 'Licensed' tab is active, showing a table with columns: 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', and 'FS Percentage'. The table lists 'ELE PRINC (9 MOS) - U7000' and 'Admin Jobs'. A right-click context menu is open over the 'ELE PRINC' row, showing options like 'Prop Buyout - Licensed', 'Add-On and Extra - Licensed' (highlighted with a red box), and 'Add-On and Extra - Support'. Another 'Actions' menu is open on the right, with 'Budget For...' selected and highlighted with a red box. Below the table is a 'SUMMARY TOTALS' section with a table showing budget details for 'Gen Fund', 'CSR', 'HOPE2', 'Magnet', 'GenF Read by 3', 'GenF SB178', 'Title I', 'ZPS-EDIT', 'Food', and 'GATE'.

Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZPS-EDIT	Food	GATE
105,121.93	0.00	0.00	0.00	0.00	(68,205.51)	0.00	16,916.42	5,928.16	91,842.14

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

The screenshot shows the 'SB Licensed AddOn-Mult' form. It has a header with 'SB Home > SB LicAddOn-Mult' and buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below the header, there are fields for 'Scenario Budget', 'Years FY21', 'Version Working_SB', and 'Entity 0235 Allen, DeanES'. The main area is a grid with columns: 'Add-On Days', 'Add-On Minutes', 'Days of Add-On Minutes', 'Add-On Note', 'Extra Days', 'Extra Minutes', and 'Days of Extra Minutes'. A right-click context menu is open over the grid, showing options like 'Edit Fund Source Details' (highlighted with a red box), 'View Add-On Extra With Fringe', 'View Add-On Extra GL Code String', 'Calc TEST', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', 'Lock/Unlock Cells', and 'Filter'. The grid also has tabs for 'Data', 'Ad hoc', and 'Format'.

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET 1

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

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

Save **Refresh** **Actions** ☐ Complete **Previous** **Next** **Close**

Manage Licensed Add-On (PERS)

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

Manage Licensed Extra (NO PERS)

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

If you have entered *Add-On* Minutes, enter the number of days (to which the minutes will be applied) in the **Days of Add-On Minutes** field. If you have entered *Extra* Minutes, enter the number of days (to which the minutes will be applied) in the **Days of Extra Minutes** field. Remember: You **cannot** split-fund add-on or extra time for a licensed employee.

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

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

Manage Licensed Add-On (PERS)

	Employee Name	Add-On Days	Add-On Minutes	Days of Add-On	Add-On Note	Earnings Expend	FS Amount Add-On	FS Percentage-Add-On			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR	Title I	21st Cent
Enter Add-On # Days, Minutes and Funding:											
Working_SB	CCSD LastName,		19.00	104.00	19 minutes for each day	2,637.83	3,471.38	100.00			

Manage Licensed Extra (NO PERS)

	Employee Name	Extra Days	Extra Minutes	Days of Extra Mi	Extra Note	Earnings Expend	FS Amount Extra	FS Percentage-Extra			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	Gen Fund	CSR	Title I	21st Century
Enter Extra # Days, Minutes and Funding:											
Working_SB	CCSD LastName,	2.00			teacher working 2	650.40	655.69	100.00			

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

SCHOOL BUDGET ⓘ

SB Home > SB LicAddOn-Mult

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

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

View Add-On Extra With Fringe

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ? Save Refresh Actions Complete Previous Next Close

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

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DearES Job KDG 1 AM/1 PM1 - C1000 Position P_10008381_1

VIEW LICENSED ADD-ON WITH FRINGE BENEFITS

		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0202 Add-On (PERS)	2,637.83	219.82	219.82	219.82	219.82	219.82	219.82	219.82	219.82
Benefits Expense-Add-On	Public Emp Retirement System	771.56	64.30	64.30	64.30	64.30	64.30	64.30	64.30	64.30
	Occupational Injury Management	22.42	1.87	1.87	1.87	1.87	1.87	1.87	1.87	1.87
	State Unemployment Ins	1.32	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.11
	Medicare	38.25	3.19	3.19	3.19	3.19	3.19	3.19	3.19	3.19
	TOTAL ADD-ON & FRINGE BENEFITS	3,471.38	289.28	289.28	289.28	289.28	289.28	289.28	289.28	289.28

VIEW LICENSED EXTRA WITH FRINGE BENEFITS

		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS)	650.40	54.20	54.20	54.20	54.20	54.20	54.20	54.20	54.20
Benefits Expense-Extra	Occupational Injury Management	5.53	0.46	0.46	0.46	0.46	0.46	0.46	0.46	0.46
	State Unemployment Ins	0.33	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03
	Medicare	9.43	0.79	0.79	0.79	0.79	0.79	0.79	0.79	0.79
	TOTAL EXTRA & FRINGE BENEFITS	665.69	55.47	55.47	55.47	55.47	55.47	55.47	55.47	55.47

CCSD School Budget Planning Tool Essentials Guide

Budgeting for Support Add-On or Extra Time

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

The screenshot shows the 'SCHOOL BUDGET' interface. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. The 'Actions' menu is open, showing options like 'View Fund Source to GL Allocations', 'View Fund Source Supplies', 'Calculate Fund Source Supplies', 'Budget For...', 'Go To Full Screen', 'Update Admin, Licensed and Support subtotals', 'Filter', 'Analyze', 'New Ad Hoc Grid', 'Show Reasons for Read-Only Cells', 'Predictive Planning', 'Business Rules', 'Smart Push Details', 'Grid Validation Messages', 'Spreadsheet Export', and 'Open in Smart View'. The 'Budget For...' option is highlighted. Below the menu, there is a table with columns: 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', and 'FS Percentage'. The table contains data for 'ELE PRINC (9 MOS) - U7000' and 'Admin Jobs'. The 'Summary Totals' section is visible at the bottom.

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

The screenshot shows the 'SB Support AddOn-Mult' form. It includes a table with columns: 'Days of Add-On Hours', 'Add-On Hours', 'Add-On Note', 'Days of Extra Hours', 'Extra Hours', 'Extra Note', and 'Click On'. The table contains data for various positions, including 'CUSTODIAN - N8040', 'HD CUST I - N8110', 'SCHOOL AIDE - N0100', 'LIBRARY AIDE - N0105', 'SPTA II - N0162', 'PE INSTR ASST - N0179', and 'INSTRUCTIONAL ASST - N0190'. A right-click menu is open over the table, showing options like 'Edit Fund Source Details', 'View Add-On Extra With Fringe', 'View Add-On Extra GL Code String', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', 'Lock/Unlock Cells', 'Filter', 'Sort', 'Analyze', 'New Ad Hoc Grid', 'Show Reasons for Read-Only Cells', 'Predictive Planning', 'Business Rules', and 'Smart Push Details'. The 'Edit Fund Source Details' option is highlighted.

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

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

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

Save **Refresh** **Actions** ☐ Complete **Previous** **Next** **Close**

Manage Support Add-On (PERS)

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

Manage Support Extra (NO PERS)

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

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

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

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

CCSD School Budget Planning Tool Essentials Guide

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.

SCHOOL BUDGET

Save

Refresh

Actions

☐ Complete

Previous

Next

Close

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

Scenario Budget

Years FY21

Entity 0235 Allen, DeanES

Job PE INSTR ASST - N0179

Employee Employee 1

Position P_10009407_1 PE INSTR ASST

➔

✎

⚙

Manage Support Add-On (PERS)

	Employee Name	Max Workdays	Max Hours	Days of Add-On	Add-On Hours	Add-On Note	Earnings Expense	FS Amount Add-	FS Perc		
	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR	Title I
Enter Add-On # Days, Hours and Funding:											
Working_SB	CCSD LastName.	194.00	7.50	183.00	2.00	2 additional hours each	5,453.40	7,176.67	100.00		

⏪

⏩

Manage Support Extra (NO PERS)

	Employee Name	Max Days-Extra	Days of Extra Hc	Extra Hours	Extra Note	Earnings Expense	FS Amount Extra	FS Percentage-Extra			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	Gen Fund	CSR	Title I	21st Century
Enter Extra # Days, Hours and Funding:											
Working_SB	CCSD LastName.	67.00	66.00	8.00	Extra days to make the	7,867.20	8,052.08	100.00			

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

SCHOOL BUDGET

SB Home > SB SupAddOn-Mult


Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DearE
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/S		
ELEM SCHOOL CLERK - N0143	P_10008400_1 FRST AID/S		
SCH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE		
COMPUTER TECH I - N1555	P_10008412_1 COMPUTER		
CUSTODIAN - N8040	P_20003917_1 COMPUTER		
HD CUST I - N8110	P_10005537_1 CUSTODIAN		
SCHOOL AIDE - N0100	P_10008413_1 CUSTODIAN		
LIBRARY AIDE - N0105	P_10008414_1 HD CUST I		
SPTA II - N0162	P_10008401_1 SCHOOL AIE		
PE INSTR ASST - N0179	P_10008402_1 LIBRARY AIE		
	P_10008403_1 LIBRARY AIE		
	P_10008406_1 SPTA II	CCSD LastName, FirstName EM_10049345	
	P_10008406_1 SPTA II	CCSD LastName, FirstName EM_10090528	
	P_10008406_1 SPTA II	CCSD LastName, FirstName EM_315789	
	P_10008406_1 SPTA II	CCSD LastName, FirstName EM_540930	
	CCSD LastName, FirstName EM_10022402	183.00	2.00
		2 additional hours each day	66.00
			8.00
			Extra days to make the

Save Refresh Actions Complete Previous Next Close

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







CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET 

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

Scenario: Budget | Version: Working_SB | Years: FY21 | Entity: 0235 Allen, DeanES | Job: PE INSTRASST - NC179 | Position: P_10066407_1

   ☐ Complete   

VIEW LICENSED ADD-ON WITH FRINGE BENEFITS

		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0202 Add-On (PER5)	5,453.40	0.00	0.00	0.00	605.93	605.93	605.93	605.93	605.93
Benefits Expense-Add-On	Public Emp Retirement System	1,565.12	0.00	0.00	0.00	177.24	177.24	177.24	177.24	177.24
	Occupational Injury Management	46.35	0.00	0.00	0.00	5.15	5.15	5.15	5.15	5.15
	State Unemployment Ins	2.73	0.00	0.00	0.00	0.30	0.30	0.30	0.30	0.30
	Medicare	79.07	0.00	0.00	0.00	8.79	8.79	8.79	8.79	8.79
	TOTAL ADD-ON & FRINGE BENEFITS	7,176.67	0.00	0.00	0.00	797.41	797.41	797.41	797.41	797.41

VIEW LICENSED EXTRA WITH FRINGE BENEFITS

		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PER5)	7,867.20	0.00	0.00	0.00	874.13	874.13	874.13	874.13	874.13
Benefits Expense-Extra	Occupational Injury Management	66.87	0.00	0.00	0.00	7.43	7.43	7.43	7.43	7.43
	State Unemployment Ins	3.93	0.00	0.00	0.00	0.44	0.44	0.44	0.44	0.44
	Medicare	114.07	0.00	0.00	0.00	12.67	12.67	12.67	12.67	12.67
	TOTAL EXTRA & FRINGE BENEFITS	8,052.08	0.00	0.00	0.00	894.68	894.68	894.68	894.68	894.68

CCSD School Budget Planning Tool Essentials Guide

Budgeting for Supplies and Other Services

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

SCHOOL BUDGET ⓘ

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

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

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

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

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19	1.00	100.00	100.00	151,057.92
Admin Jobs	Total All Positions			1.00			151,057.92

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE		
REMAINING BUDGET TO SPEND	(239,480.83)	(88,205.51)	0.00	0.00	500.00	(88,205.51)	0.00	(415,391.90)	5,928.16	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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

SCHOOL BUDGET ⓘ

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

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

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

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

Period: BegBalance

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

SUMMARY TOTALS

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ ☐ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

Period BegBalance

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

SUMMARY TOTALS

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

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ ☐ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

Period BegBalance

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

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE
FS Amount Add-On	7,176.67							7,176.67		
FS Amount Extra	8,052.08							8,052.08		
All Jobs										
Supplies and Other Services	5,000.00				88,500.00	37,200.00		130,700.00		
Service Level Agreement	124,905.52							124,905.52		
TOTAL BUDGET SPENT	2,553,808.64	441,027.55			88,500.00	125,405.51		3,208,741.70	36,958.09	0.00

CCSD School Budget Planning Tool Essentials Guide

Exporting a Tab and Budget Totals

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ ☐ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

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

		Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage
		Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.0
Admin Jobs	Total All Positions					1.00	

SUMMARY TOTALS

- View Fund Source to GL Allocations
- View Fund Source Supplies
- Calculate Fund Source Supplies
- Budget For...
- Go To Full Screen
- Update Admin, Licensed and Support subtotals
- Filter
- Analyze
- New Ad Hoc Grid
- Show Reasons for Read-Only Cells
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Spreadsheet Export**
- Open in Smart View

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

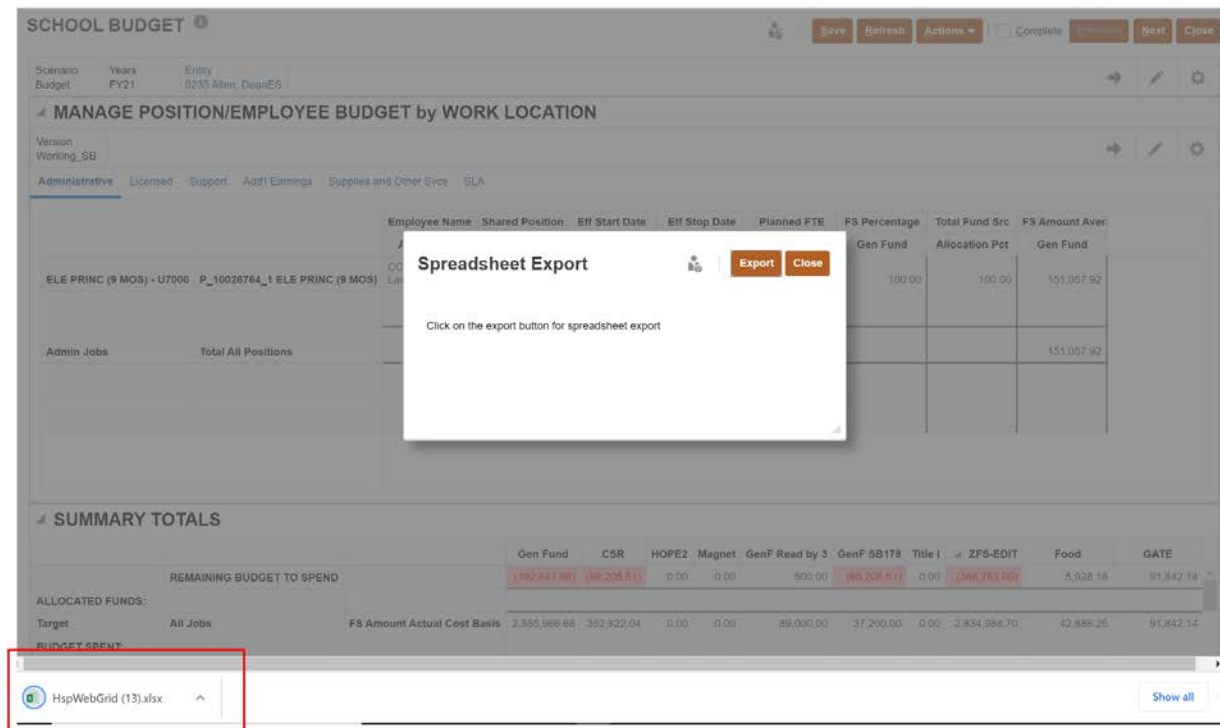
Spreadsheet Export



Click on the export button for spreadsheet export

CCSD School Budget Planning Tool Essentials Guide

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



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

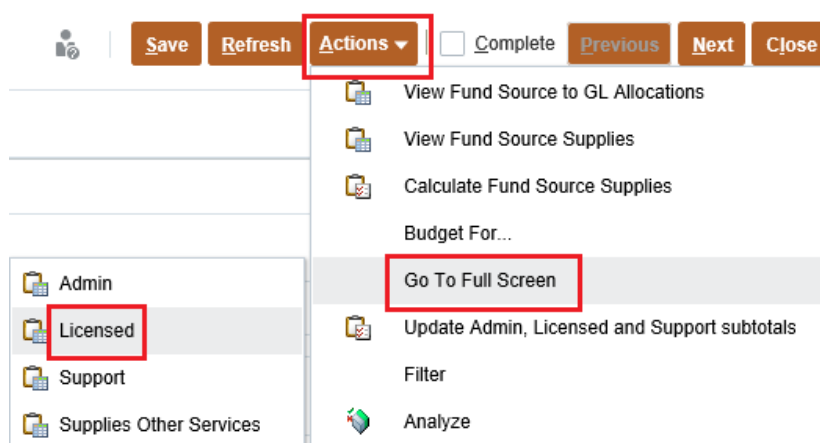
Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Assumption	RegBalance	Unspecified Fund	Unspecified IO	Unspecified FuncArea	Unspecified Cost Center
CCSD LastName, FirstName EM_325191		8/7/19							
CCSD LastName, FirstName EM_331715		8/7/19							
CCSD LastName, FirstName EM_516040		8/7/19							
CCSD LastName, FirstName EM_10014323		8/7/19							
CCSD LastName, FirstName EM_303745		8/7/19							
CCSD LastName, FirstName EM_553069		8/7/19							
CCSD LastName, FirstName EM_524230		2/20/20							
CCSD LastName, FirstName EM_312411		8/7/19							
CCSD LastName, FirstName EM_520954		8/7/19							
CCSD LastName, FirstName EM_10084404		8/7/19							
CCSD LastName, FirstName EM_10034305		7/1/20							
CCSD LastName, FirstName EM_507600		8/7/19							
CCSD LastName, FirstName EM_524230		2/20/20							
CCSD LastName, FirstName EM_10014323		8/7/19							
CCSD LastName, FirstName EM_10109611		7/1/20							
CCSD LastName, FirstName EM_116074		8/7/19							
CCSD LastName, FirstName EM_546907		7/1/20							

CCSD School Budget Planning Tool Essentials Guide

View Employee's Actual Salary Rate

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

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



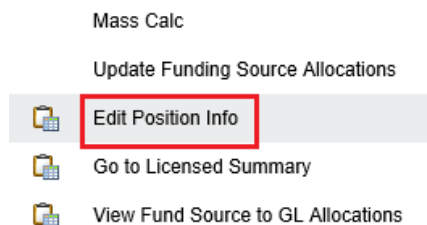
2. Locate the employee you want to view the salary for and click to **highlight** the position

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario	Version	Years	Entity							
Budget	Working_SB	FY21	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
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191			8/7/19		1.00	100.00	
						8/7/19		1.00	100.00	
						8/7/19		1.00	100.00	
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323			8/7/19		1.00	100.00	
		Employee 2	CCSD LastName, FirstName EM_303745			8/7/19		1.00	100.00	
		Employee 3	CCSD LastName, FirstName EM_553069			8/7/19		1.00	100.00	

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



CCSD School Budget Planning Tool Essentials Guide

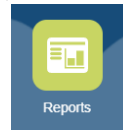
- You will be able to see both the employees **Actual** salary and **Average** salary for the position

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

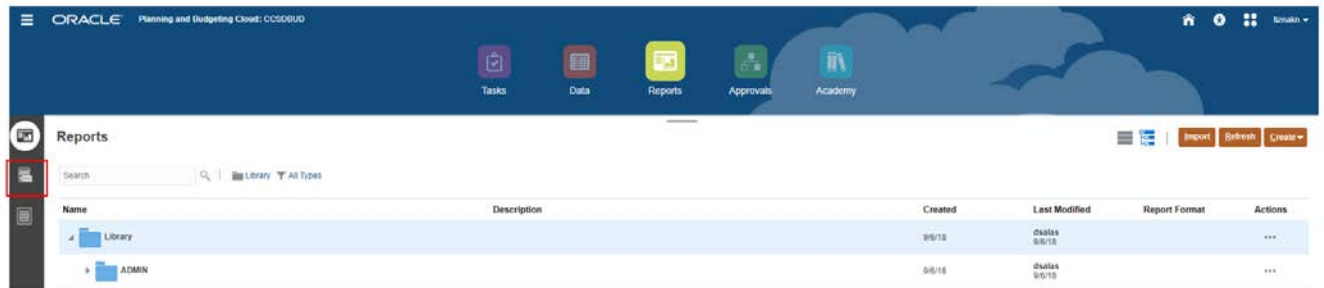
CCSD School Budget Planning Tool Essentials Guide

Printing Budget Plans

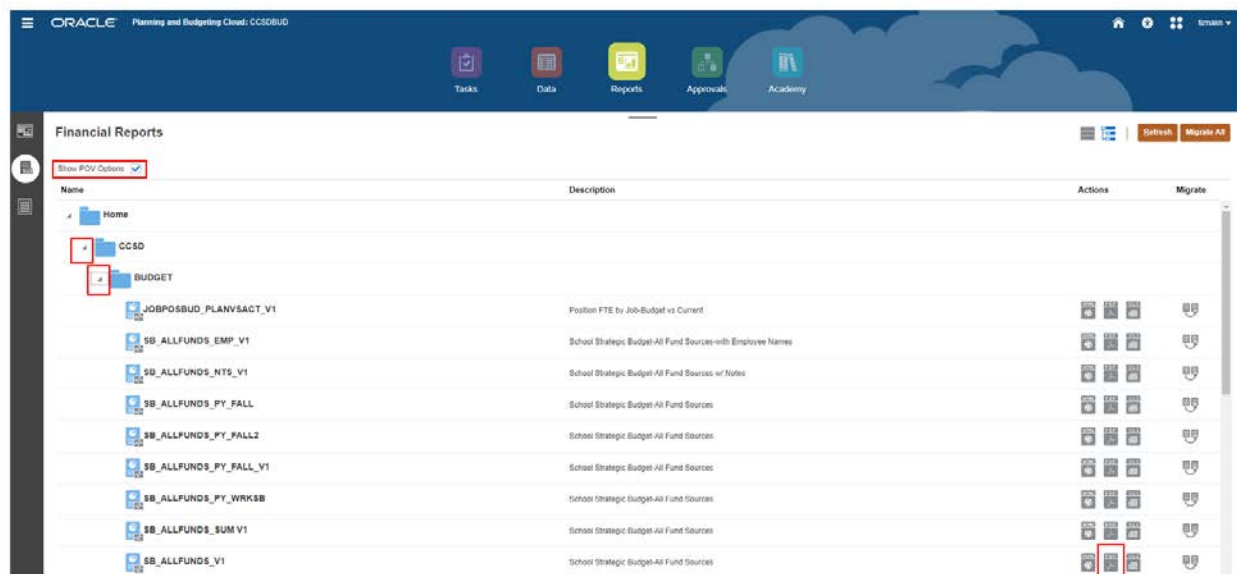
1. From the Budget Planning Tool Home page, click the Reports icon card.



2. Click the **Financial Reports** icon



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.



CCSD School Budget Planning Tool Essentials Guide

- 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.

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Respond to Prompts at Report Level

Prompt	Selection	Type	Source
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: GenFund
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: All
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: GF Supp
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: All

Help OK Cancel Reset

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

SB_ALLFUNDS_V1

PDF Preview

CCSD Strategic Budget Plan
0235 Allen, DeanES
2020-2021 School Year
1/23/2021

WL_0235

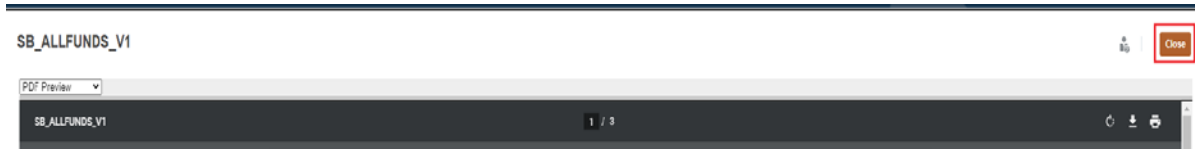
		Gen Fund	GenF SB178	CSR	Food	Gen GATE	GenF Read by 3	Sp Ed	Cost	Cost (%)
ALL FUNDING SOURCES										
Plan Summary										
Admin Jobs	Total Funding Amount	151,058							151,058	3.94%
Licensed Jobs	Total Funding Amount	1,704,110	88,206	441,028		88,206		375,514	2,757,083	71.91%
Licensed Jobs	FS Amount Prep Buy	14,663							14,663	0.38%
Licensed Jobs	FS Amount Add-On	6,082							6,082	0.16%
Licensed Jobs	FS Amount Extra	1,297			36,956				1,297	0.03%
Support Jobs	Total Funding Amount	471,464						129,456	607,578	16.64%
Support Jobs	FS Amount Add-On	7,177							7,177	0.19%
Support Jobs	FS Amount Extra	8,052							8,052	0.21%
Supplies and Services	Service Level Agreement	124,006	37,200					88,500	124,006	3.28%
Total		2,548,809	125,406	441,028	36,956	88,206	88,600	504,970	3,833,875	100.0%

WL_0235

Job	Position	Assumption	Shared Position	Months Week Override	Avg Hours	Planned FTE	Gen Fund FS Amount Basis	Gen Fund FS Amount Prep Buy	Gen Fund FS Amount Add-On	Gen Fund FS Amount Extra	GenF SB178 FS Amount Basis	CSR FS Amount Basis	Food FS Amount Basis	Gen GATE FS Amount Basis	Sp Ed FS Amount Basis
ELE PRINC (9 MOS) - U7000	P_10026764_1			11 Months		8	1	\$151,057.92							
	PGRP_950						1	\$151,057.92							
Total Administrative Staffing							2	\$302,115.84							
KDG 1 AM/1 PM1 - C1000	P_10008381_1			09 Months		7	1	\$80,205.51	\$7,065.91	\$3,471.38	\$665.69				
				09 Months		7	1	\$80,205.51	\$2,254.28	\$708.57					
				09 Months		7	1	\$80,205.51							
				09 Months		7	1	\$80,205.51							
	PGRP_014			09 Months		7	1	\$80,205.51							
				09 Months		7	1	\$80,205.51							

CCSD School Budget Planning Tool Essentials Guide

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



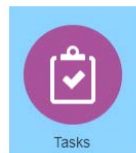
CCSD School Budget Planning Tool Essentials Guide

Promoting (Submitting) a Work Location Budget

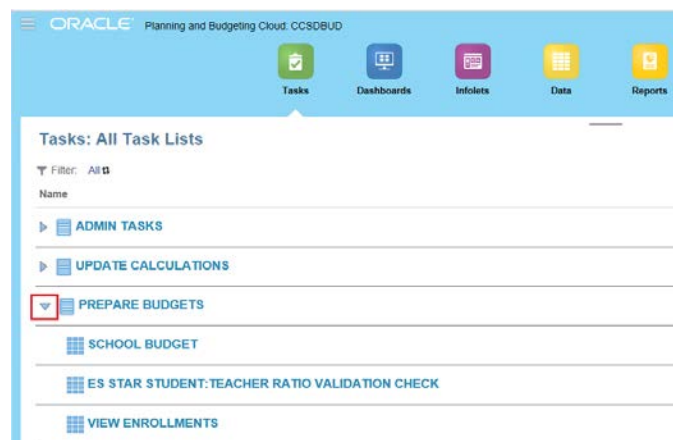
1. Go to the homepage (if you are not already there) by clicking on the **Home** icon.



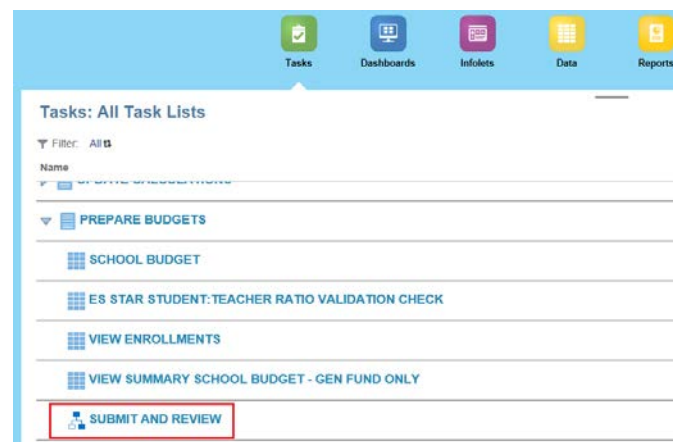
2. Click on the **Tasks** icon



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



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



CCSD School Budget Planning Tool Essentials Guide

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

The screenshot shows a 'Filter' window with a title bar containing a user icon, a grid icon, and buttons for 'Clear All', 'Apply', and 'Cancel'. The 'Scenario' dropdown menu is open, showing options: 'Select', 'Actual', 'Budget' (highlighted in blue), 'DetailScen', and 'PositionRequest'. The 'Version' dropdown is set to 'Strategic Budget'. The 'Approvals Status' and 'Approval Unit' fields are empty. A 'More' button with a plus icon is at the bottom left.

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

The screenshot shows the 'Filter' window with the 'Scenario' dropdown set to 'Budget' and the 'Version' dropdown set to 'Strategic Budget'. The 'Approvals Status' dropdown is open, showing options: 'Select', 'Tentative Budget', 'Final Budget', 'Amended Final Budget', 'Base', 'BU Version_1', 'CurrSaved', 'Final', 'LastSaved', 'SharedPositions', 'Target', 'What if', 'Loaded Assumption - Working', and 'Strategic Budget' (highlighted in blue). The 'Approval Unit' field is empty. A 'More' button with a plus icon is at the bottom left.

7. Click **Apply**.

The screenshot shows the 'Filter' window with the 'Scenario' dropdown set to 'Budget' and the 'Version' dropdown set to 'Strategic Budget'. The 'Approvals Status' and 'Approval Unit' fields are empty. The 'Apply' button is highlighted with a red box.


CCSD School Budget Planning Tool Essentials Guide

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

SUBMIT AND REVIEW

Approvals


Sort By: Approval Unit Filter: Budget Working_SB




0235 Allen, DeanES
SG_0235
Under Review

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


Change Status: 0235 Allen, DeanES



Action Promote




Annotation




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


Change Status: 0235 Allen, DeanES



Action Promote





Annotation



CCSD School Budget Planning Tool Essentials Guide

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

Change Status: 0235 Allen, DeanES



Action Promote



Annotation

Change Status

Add Annotation

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

Change Status: 0235 Allen, DeanES




Action Promote




Annotation

Change Status

Owner <Automatic>

 Refresh Done

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

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




14. Click **Done**.

CCSD School Budget Planning Tool Essentials Guide

Change Status: 0235 Allen, DeanES

Refresh Done

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 Reply	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 Working_SB

	0235 Allen, DeanES BUDGET_DEPT_GRP Under Review
---	---

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

SUBMIT AND REVIEW

Approvals

Sort By: Approval Unit Filter: Budget Working_SB

0235 Allen, DeanES
BUDGET_DEPT_GRP
Under Review

Complete Previous Next Close


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.

CCSD School Budget Planning Tool Essentials Guide

Error Messages when Submitting a School Budget

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



WL_0279
SG_0279
Under Review

Failed: Invalid Data

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

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



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

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



WL_0235
HANEVGA
Under Review

Failed: Not Enough Access

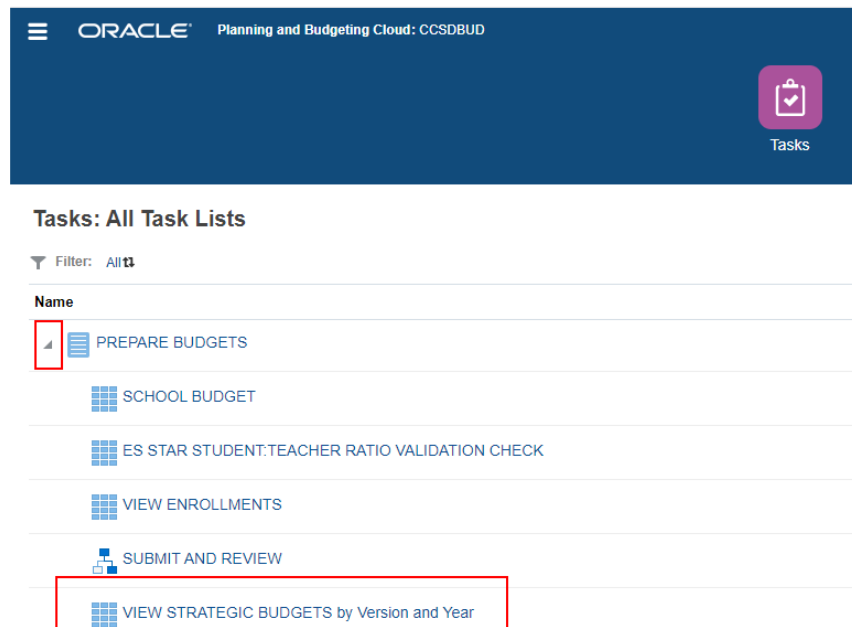
CCSD School Budget Planning Tool Essentials Guide

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**.



CCSD School Budget Planning Tool Essentials Guide

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

VIEW STRATEGIC BUDGETS by Version and Year ⓘ

Scenario Budget	Years	Entity
	FY22	0235 Allen, DeanES

- View School Detail
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Analyze
- New Ad Hoc Grid
- Show Reasons for Read-Only Cells
- Predictive Planning
- Business Rules
- Smart Push Details
- Grid Validation Messages
- Spreadsheet Export

	2nd Grade	3rd Grade	4th Grade	5th Grade
	66	72	84	67

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 ⓘ

View Enrlmnt and summary totals > Archived Budgets

Scenario Budget	Context Version	Context Entity	Current Year of View
	Fall Budget	0235 Allen, DeanES	FY21

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Administrative | Licensed | Support | Add'l Earnings | Supplies and 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 PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	7/24/19		1.00	100.00	100.00	151,057.92

SUMMARY TOTALS

Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	Academic Support Funding	Title I	ZFS-EDIT

CCSD School Budget Planning Tool Essentials Guide

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.