

## School Budget Promotion FAQs

**Q:** Principal promoted the school budget for Region review but needs to make additional changes, how can the school budget re-open for editing?

**A:** In *Approvals*, the region reviewer selects the action “**Originate**” to send the budget plan to the School Group for revisions.

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| <b>Originate</b> | Moves the budget to the first level in the promotional path; the school group | Defaults to Automatic. Sends the budget plan to the <b>School Group (principal)</b> for revisions. |
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**Q:** The reviewer (Region, TAT, or Budget Dept Group) is recommending revisions to the budget, what is the proper procedure?

**A:** The reviewer requesting the change must send the budget back to the school group (SG\_XXXX) by selecting the action “Originate” or “Reject”. If the action **Reject** is selected, an annotation with the requested revisions should be included.

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| <b>Reject</b> | Moves the budget to the previous group in the promotional path. The Region reviewer does not approve the submitted plan and is requesting revisions to the budget. | Defaults to Automatic. Sends the budget plan to the <b>School Group (principal)</b> for revisions. |
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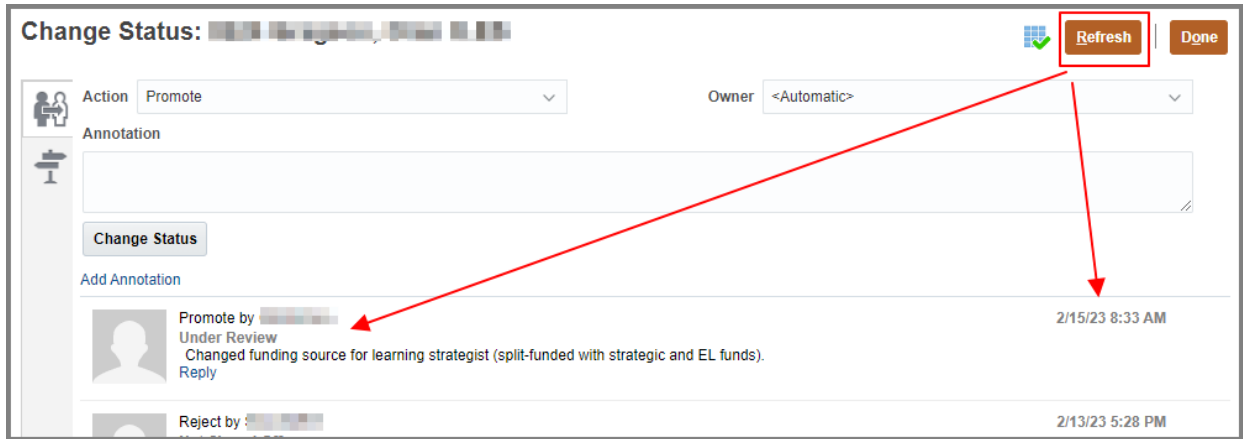
**Q:** The reviewer promoted or rejected the budget mistakenly, how can the reviewer correct the action?

**A:** The Region, TAT, and Budget Dept Group members can select the action “**Take Ownership**” to route the budget back to themselves and then re-launch the correct action (reject/promote).

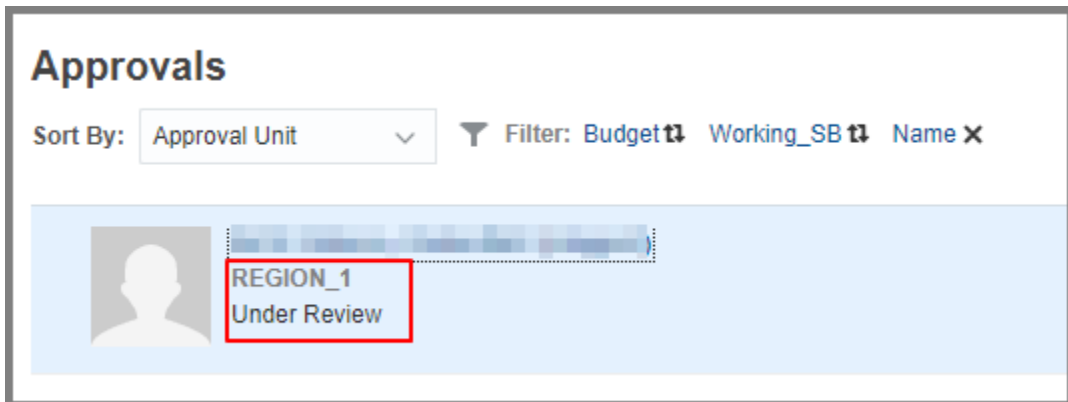
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| <b>Take Ownership</b> | Region reviewer can claim ownership of the budget from their region group (each region has multiple users and anyone in the region group can submit the budget). This action takes the budget promotion ability from everyone else in the region group. | Defaults to Automatic. The budget plan routes to the user that selects the Take Ownership action. |
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**Q:** How do I know the budget action (Promote, Reject, Originate, Take Ownership, etc.) worked when I clicked the *Change Status* button?

**A:** After you click *Change Status* click the **Refresh** button to see the action you submitted with the time stamp and any annotations added.



You can click Done to return to the Approval page confirm your budget was promoted to the correct reviewer:



**Q:** There is a balance (positive or negative) in the Sp Ed fund source column, what should the users do?

**A:** The school budget can be promoted and approved with any amount in the Special Ed column. Sp Ed is editable for the Spring FY24 open budget cycle to accommodate SSD memo changes (gaining or losing units). Schools are not required to balance this fund as it is still centrally managed by SSD and not part of their strategic budget.

**Q:** Does a school need to adjust their Special Ed positions?

**A:** There is no system requirement to make adjustments to Special Ed positions, the budget reviewers will advise through the approval process if any changes are necessary.