
2021-2022 Guide

Goal for February submission:

- Balance all site-controlled resources
- Budget for (move) all needed positions and non-salary expenses under Resources with allocations.
- To balance site-controlled resource(s), this figure has to be within +\$1 and -\$1. Select the current phase and choose "Site Controlled Resources".

Quick steps to balance your budget:

A. Look at current funding

- 1). Login and on the Main Menu page locate the "Snapshot Reports" on the left navigation bar.
 - a. Download and review "Allocation Details" Report to see breakdown of how much District allocation is available for certificated job codes. This report is static.
 - b. Download and review "Site Controlled Resources" Report to see which resources need to be balanced and by how much. This report will change as you make adjustments in your workbook.
 - c. Download and review "FTE Allocation to Projected" Report to see the variance between allocated and projected FTE for your site. This is where you will be able to determine if you've allocated the correct FTE by job code for your resources.(00010, 00015, 00016 etc...). This report will change as you make adjustments in your workbook.
 - 2). Go to Step 5 (Positions)
 - a. Make adjustments for known staffing (certificated and classified) changes that will happen next year, such as retirements, reduced workload, leave of absence, voluntary reductions.
 - b. Select appropriate reason for each FTE change. (See guidelines on www.sandi.net/sbb)
 - c. Remember you can click on the \$ sign next to the staff name and adjust funding for that position.
 - 3). Go to Step 6 (Certificated Assignments)
 - d. Upload master schedule
 - e. Select and add a subject for your certificated staff. HR will verify credentials for staffing with the negative sign.
 - 4). Go to Step 7 (FTE funding)
 - a. Review Surplus/Deficit line.
 - b. Review the staff being currently funded by this resource.
 - c. Go staff by staff and review FTE and funding changes from Step 5. FTE from Step 5 must match the Total FTE column. Look for Green Checks (✓) confirming FTE and funding are correct. You can make FTE funding adjustments in Step 7 by selecting the name of staff member.
 - d. Report will change as you make adjustments in your workbook.
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5). Go to Step 8.

- a. Review Surplus/Deficit line. How much more needs to be adjusted.
- b. Review the expenditure line items funded by each resource (Actuals) for records of current spending.
- c. Enter non-salary costs for each Resource and balance.

B. Review and Submission (10)

- 1). Go to Step 10 and verify that all resources with a checkmark are balanced in the “Undistributed” column.
- 2) Go to Step 10 and click on the [Click here to sign] link against your name and then click on “Open” link in the upper right hand corner to submit budget.
 - a. If there are no errors, follow the prompts to submit your budget
 - b. If there are errors in your budget a window will open with a list of issues and the steps in which they occur. You can download a copy by clicking on the report link.
 - c. Correct the errors and then follow the submission process.