

ASCENDER - Position Management: Interface to Budget Checklist

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The purpose of this document is to guide you through the necessary steps to interface to Budget.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.



Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

Interface to Budget Checklist

	Step
❑	(Optional) Budget > Utilities > Mass Increase/Decrease Account Codes > Recommended Prior to performing this step, generate a report that contains the payroll account amounts that currently exist in Budget. Review the report to confirm that only 61XX accounts exist and the simulation is set up to produce the wanted results. Print or save the report. You can clear the existing amounts with a budget simulation. ❑ Clear existing 61XX accounts in Budget. ❑ Select the tab that contains your next year budget information. For example, if the budget is in the **Recommended** column, select that tab to create the simulation. ❑ Create a simulation (e.g., ZERO 61XX). • In the **Base** Column, select **Next Yr Recommend**. • In the **Account Code** field, type XXX-XX-61XX-XX-XXX-XXXXXX. • In the **Operator** field, select *Equal*. • In the **Percent/Amount** field, type *0.00*. ❑ Click **Save**. ❑ Click **Execute**. A report with the proposed changes is displayed. Clicking **Execute** does not clear the 61XX budget amounts. ❑ Click **Process** to save the simulation. Clicking **Process** does not update Budget.

	Step
❑	Budget > Utilities > Budget Level Processing Process the budget simulation to zero the amounts. This step processes the previously created simulation. Depending on the selections, the amounts in the **Recommended** or **Approved** columns are set to zero. On the Recommended or Approved tab, select the simulation and click **Execute**. This process zeros the amounts on the Maintenance > Budget Data page.
❑	**Log on to the next year.** Position Management > Utilities > Salary Simulation > Simulation Options Interface the 12-month simulation to Budget. • If you already updated forecast for your 12-month employees, **it is important** to select *No* in the **Update Forecast** field as you do not want to add an additional increase. If this field is not updated, the simulation process updates the existing positions with an additional increase for the year and increments the step by a year. • In the **Update Budget**, select *R - Replace the amounts in Budget*. • Confirm the **Update Budget Amount** field reflects the column to be updated in Budget. ❑ Click **Save**. ❑ Click **Execute**. Review the reports to confirm that there are no errors, all 12-month employees are included, and the salary amounts are correct. ❑ Click **Process** to update the amounts Budget.
❑	**Log on to the next year.** Position Management > Utilities > Salary Simulation > Simulation Options Interface the 11-month simulation to Budget. Retrieve the simulation that contains ALL employees and remove first pay date codes that contain 12-month employees. It is important not to interface employees to Budget more than one time. OR • If you already updated forecast for your 11-month employees, **it is important** to select *No* in the **Update Forecast** field as you do not want to add an additional increase. If this field is not updated, the simulation process updates the existing positions with an additional increase for the year and increments the step by a year. • In the **Update Budget**, select *I – Increase or add to amounts in Budget*. • Confirm the **Update Budget Amount** field reflects the column to be updated in Budget. ❑ Click **Save**. ❑ Click **Execute**. Review the reports to confirm that there are no errors, all 11-month employees are included, and the salary amounts are correct. ❑ Click **Process** to update the amounts in Budget.

	Step
❑	**Log on to the next year.** Position Management > Utilities > Salary Simulation > Simulation Options Interface the 10-month simulation to Budget. Retrieve the simulation that contains ALL employees and remove first pay date codes that contain 12-or 11-month employees. It is important not to interface employees to Budget more than one time. OR Create a new simulation that contains only 10-month employees. ❑ In the **Update Budget** field, select *I – Increase or add the amounts in Budget* to increase the existing amounts in Budget. **IMPORTANT**: **Do not** select *R - Replace the amounts in Budget* as it overwrites the 12-month salaries already interfaced to Budget. ❑ Click **Save**. ❑ Click **Execute**. Review the reports to confirm that there are no errors, all 10-month employees are included, and the salary amounts are correct. ❑ Click **Process** to update the amounts in Budget.